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**AN ANALYSIS OF
FIELD SALES SUPERVISION**

**A THESIS
PRESENTED TO
THE FACULTY OF THE GRADUATE SCHOOL
THE UNIVERSITY OF RICHMOND**

**In Partial Fulfillment
of the Requirements for the Degree
Master of Arts in Economics**

**by
Ross Lawrence Goble
June, 1963**

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CHAPTER I

INTRODUCTION

"Well in our country," said Alice, still panting a little, "you'd generally get to somewhere else - if you ran very fast for a long time as we've been doing."

"A slow sort of country!" said the Queen. "Now, here, you see, it takes all the running you can do, to keep in the same place. If you want to get somewhere else, you must run at least twice as fast as that!"¹

Was Lewis Carroll, so long ago, possessed with a sufficient amount of foresight and empathy to enable him to share the daily thoughts of modern marketing executives? Or do the above verses merely sound that way.

The answer to this enigma will of course never be known, but it does seem true that most sales executives, at one time or another feel somewhat trapped by this treadmill concept.

In recent years this feeling has no doubt been intensified by the ever increasing complexity and competitive nature of the distribution function.

1 Lewis E. Carroll, Through The Looking Glass, Charles Scribner's Sons, New York, p. 186, 1938.

Although no definitive panacea seems in sight, more effective sales productivity is available to those executives willing to encourage the formulation and use of adequate field sales supervision. Since this general view seems to be shared by most of these same executives and by students of marketing alike, it is disappointing that so little literature has been written in this specific area.

It is true, of course, that a vast amount of literature dealing with sales management on the executive level has been forthcoming. It is also true that many worthwhile contributions dealing specifically with the supervision of production personnel have been published.

One reason for this apparent void in the literature may be the fact that most serious students of marketing lack a varied and extensive practical background in distribution and have, therefore, tended to overlook the fertile area of field supervision.

On the other hand marketing executives who have recognized the need in this specific area have often lacked the time or academic training required to produce a major contribution in this subject.

In the firm belief, therefore, that the subject of field sales supervision is unique and has been widely

neglected by both students of marketing and sales executives alike, this work was undertaken and throughout the remainder of this paper the rather unwieldy terminology field sales supervision will be reduced to merely supervision.

Basic Tenets

It will be the intent and purpose of this paper, therefore, to establish and analyze two basic tenets.

One:

The marked lack of interest and neglect from both students of marketing and sales executives in this specific area.

Two:

The premise that effective field supervision represents one of the most important single links in the total distribution function of organizations with a field sales force.

Background of Supervisory Neglect

Since shortly after the close of World War II an ever increasing amount of effort has been devoted toward the application of scientific methods in the solution of sales problems. New scientific technique has

been applied, for example, to such general areas as sales forecasting, traffic problems, product development, and the initial selection and training of salesmen. This trend is encouraging and substantial progress has been made by the use of scientific methodology to most of these general problems. The use of scientific methods in the selection and training of salesmen is, however, a step half taken, the other half, continued and effective supervision must also be supplied if the initial investment of time, money and effort are to be protected. Despite this general trend, however, the field of supervision remains widely neglected.

This neglect on the part of most sales executives is of importance because almost all of these same sales executives seem to be in agreement as to the value of effective supervision. Frequently, sales managers take all of the other steps necessary to help their men sell effectively, but either follow traditional practices of supervision, imitate those of some other companies which may not themselves be supervising well, or in general ignore this vital phase of management in the marketing field. A rather marked neglect of basic psychological principles seems all too often to have been common.

"Some students of distribution even go so far as to assert that supervision constitutes the greatest neglected

field in the practice of professional sales management." ²

Most sales organizations then are already in possession of an untapped reservoir of potentially productive salespower, needing only the spark of effective, creative supervision to make it a usable asset.

Summary of Chapter I

Chapter one has been intended primarily as an introduction and justification for the need of additional contributions to the meager existing stock of literature on the subject of field sales supervision.

Since time was of necessity a limiting factor, both the general background information and specific detailed data were collected from the following sources.

(1) An extensive review of all published material available to the author.

(2) Limited interviews with interested and cooperative sales executives and students of marketing in the general area of Richmond, Virginia.

(3) The personal experience and views of the writer in the field of sales management.

2 Harold H. Maynard and Herman Nolen, Sales Management, Ronald Press Company, New York, p. 230, 1950.

Chapter II

BACKGROUND FOR THE NEGLECT OF SUPERVISION

Reasons for the Neglect of Supervision

Since the importance of supervision and its need seem well recognized, its general absence seems difficult, if not almost impossible to understand. A closer look, however, discloses several almost obvious reasons for this neglect.

Supervision Not Required

In the first place, many sales executives overlook the need for effective supervision because they honestly believe none is necessary if they have carefully selected and initially trained their salesmen. It is, however, an established principle of management that even the most highly skilled people utilize their skill most effectively only when under competent direction and supervision.³

Difficulties of Supervision

Secondly, and certainly of equal importance, is the inherent difficulty in effectively supervising field sales personnel. Factory workers and inside production personnel frequently occupy positions of such exacting

3 P. H. Nystrom, Marketing Handbook, Ronald Press Company, New York, p. 22, 1948.

standards as to make performance comparisons relatively simple. Even inside sales people and clerks are usually in the immediate proximity of their supervisors and direct standards of comparisons are therefore simplified.

Geographic Complications

The wide variance in actual sales potential, which may and often does exist between various sales territories within a given firm, complicates the job of field supervision. In addition, widespread geographical distances between sales areas further compounds the costs involved in both time and money.

Supervision As An Abstract Function

Another important reason, which most marketing executives are not prone to admit, is that they secretly question the advisability of supervision because it appears to them an abstract function. In these instances the direct cost of supervision is a readily measurable factor while the immediate results are not. This reason alone may explain the incongruous attitudes of many marketing executives who extend quick verbal recognition concomitantly with a practical reluctance to accept a working, comprehensive program of supervision with its attendant costs in time and effort.

Despite the difficulties involved in supervising field salesmen, an encouraging trend is developing toward closer supervision as its importance becomes more widely accepted. A recent and excellent example of this was brought to light when the editors of Modern Industry, in the autumn of 1959, asked their subscribers what should be done to step up sales efficiency in a full-fledged buyers market. The number one answer, given by sixty-five per cent of those who replied, was better supervision.⁴

Ostrich Attitude

Another attitude, which is difficult to correlate with the caliber of men one usually associates with top management, is the ostrich. Simply stated this group merely overlooks the salesmen's problems on the apparent assumption they will resolve themselves or disappear. Closely allied with these "progressive thinkers" are those who flatly state -- all dissatisfied salesmen will merely be replaced. Whenever these basic sales philosophies prevail, there will be, as a result, a high turnover of salesmen and the existence of a sales organization forced to function at a fraction of its total selling efficiency.

⁴ H. R. Tosdal, Problems In Sales Management, Ronald Press Company, New York, p. 578, 1948.

Compensation Attitude

A sixth reason for some sales executives' neglect of the supervision of their salesmen is their belief that if salesmen are paid well and in a fair manner the need for supervision will not exist. An adequate compensation plan is helpful in motivating, stimulating and controlling the actions of salesmen, but it can never replace adequate field supervision.

Mass Methods

An additional reason personal supervision is neglected by some executives is that they believe all the supervision necessary can be accomplished by mass methods. Mass supervision carried on by sales meetings, contests, and conventions often fulfills a basic need. The group approach economizes the time of sales executives in imparting information that should be received by the entire sales force. In addition it has the added advantage of a simultaneous presentation, which for purposes of timing may well be of utmost importance. In some types of training the group method may even be more effective, as group interaction may be of invaluable aid in training. The chief difficulty, however, in supervising

field sales personnel is not in the improper performance of mass methods now used as might, perhaps, be charged in the initial selection and training of salesmen. The chief shortcoming is the lack of personal supervision. Mass supervision is good as far as it goes; but many executives, because of their emphasis on mass supervision, do not see the real need for personal supervision. Mass supervision entails dealing with all men by one uniform method. When the individuality of a salesman is ignored, all the symptoms of a poor human relations situation, such as policy breaking, and a rapid turnover of personnel are apt to become prevalent.

Salesmen Object To Supervision

A final reason for the neglect of supervision, and the one which most sales executives do not openly admit to believing, is that salesmen themselves do not want supervision. This last attitude will be dealt with separately in the following chapter.

Summary of Chapter II

Chapter two has dealt with the broad acceptance, by most people engaged in marketing, of the need for adequate sales supervision.

In addition, the following eight reasons for the neglect of adequate supervision were discussed.

- (1) Supervision Not Required
- (2) Difficulties of Field Supervision
- (3) Geographic Complications
- (4) Supervision Seen By Management As An Abstract Function
- (5) Ostrich Attitude
- (6) Compensation Attitude
- (7) Mass Methods
- (8) Salesmen Object To Supervision

The last objection is so widely held and generally misunderstood that it becomes the basis for Chapter III.

Chapter III

DO SALESMEN WANT SUPERVISIONIntroduction

Each of the eight reasons for the neglect of supervision discussed in the previous chapter is considered of importance, but the widely held view that salesmen themselves do not want supervision has been singled out for a more detailed analysis in this chapter.

This view when held by marketing management, whether logical or not, presents an almost insurmountable obstacle to the formation of an effective program of field supervision. It seems reasonable to assume, that since many of today's sales executives were themselves very successful salesmen in an era which extended little recognition to supervision, their attitude toward this facet of management may have remained static. In the period in which these leaders of today were developing skills in their chosen field, little study and less attention was usually offered in the direction of effective supervision. As a result, many of these "self made men" may tend to regard with subtle scorn a relatively costly program designed to help, what may appear to them to be, the weaker members of their organization.

The years between the late nineteen twenties and the outbreak of World War II were years of transition in the selection and training of sales people. During these years a management attitude of "sell or sink" was not uncommon - in fact, it was often the rule. Aggressive, successful survivors of this tough school often displayed little sympathy for those who fell by the wayside.

It may also be well to remember that many of these executives were members of infant companies that had not yet felt the need for supervision, since the firm's limited size made direction from the home office both possible and meaningful.

During these formative years of many companies, supervision programs grew awkwardly and slowly. Each successive error during this period may well have added fuel to dormant fires of resentment among the better salesmen. From this same group, to a large degree, were to be drawn the sales executives of today.

Changing Views

The sales environment which exists today, however, varies widely from that which existed prior to World War II. Today's salesmen are more carefully selected and trained and tend, within a given firm, to a more

uniform and homogenous group. The market place in which they compete has become more diverse, complex and competitive and they are slowly making known their desire for more effective supervision.

Through the salesman's eyes, field supervision assumes new dimensions. Field salesmen operate in an unusual environment in which their supervisors occupy a critical position. There is often considerable distance, both physical and mental, between the territorial representative and their company headquarters. Of necessity, therefore, the local manager is the company to his salesmen in the field - their only official link with the Home Office. Not only does the supervisor personify company authority, he is the individual to whom the salesman must look for advice, encouragement, and advancement. It seems axiomatic, then, that field supervision involves a highly personal relationship between the salesman and his supervisor - a relationship which is the very core of effective supervision.

Supervision From The Salesman's View

Effective management in the field, as a company objective, is more than a satisfying exercise in sound

personnel practices, it is the life blood of sales success. The strategic position of field supervisors becomes more clearly evident when we examine the following reasons, given by Dr. Robert T. Davis of Stanford University, as to why salesmen desire more effective supervision.

In a very real sense, salesmen are "different." As compared with other company employees, they are subject to much more pronounced emotional ups and downs - not because they are peculiar individuals but because of the nature of their jobs. The average field salesman works alone; alone he must bear the disappointments of the lost sale, the frustrations of the delayed sale, or, happily, the exhilaration of the well-earned sale. He is not in constant contact with his fellow employees; if he travels for extended periods, he doesn't even have a family to return to each evening. Thus, in addition to being the salesman's major contact with the company the field sales manager is the one person to whom he can turn for counsel and encouragement. For the salesman in the field, the local manager replaces the colleagues and constant inside supervision that the office worker takes for granted.

An equally significant characteristic of sales organizations is the fact that the field sales manager establishes the standards of performance and behavior for his men. Selling is a job replete

with intangibles; there are no convenient dials to set, formulas to calculate, or tolerances to allow for. Selling is a relationship between people; as such, it can hardly be routinized, or standardized. Hence, it is especially important that there be some standards of performance and behavior to guide the individual salesman. And it is the field sales manager who sets such standards - his expectations, his attitudes which establish beyond a doubt a working environment that either aids or hinders his subordinates. ⁵

Field Questionnaires

Turning now to the last and perhaps most significant factor regarding whether salesmen do or do not desire supervision, it seems pertinent to examine a rather extensive field questionnaire study completed by Dr. Charles Lapp.

"Three hundred and seventy-one salesmen were contacted in connection with the conduct of this study to find out if they felt an increased amount of supervision - that is, direction, motivation, continued training and control - would increase their selling efficiency. Two

5 Robert T. Davis, The Field Sales Manager, American Management Association, Inc., New York, p. 15, 1960.

of the studies were made of insurance salesmen attending the Life Insurance Marketing Institute at Purdue University. A class of fifty-nine insurance salesmen, who had been with their present company one year or less, replied in the following manner:

52.5% believed an increased amount of supervision would increase their selling efficiency.

35% thought maybe an increased amount of supervision would help their selling efficiency.

12.5% only, believed that an increased amount of supervision would not increase their selling efficiency.

The replies of a class of forty insurance salesmen attending the same institute, who had been with their present companies two years or less, were as follows:

55% believed an increased amount of supervision would increase their selling efficiency.

20% thought maybe an increased amount of supervision would increase their selling efficiency.

25% believed that an increased amount of supervision would not increase their selling efficiency.

The answers of the two groups of salesmen are particularly significant for two reasons. One, the top insurance companies are generally considered to be making a scientific approach to the problems of sales management. Second, the salesmen contacted at the Life Insurance Marketing Institute are considered by their managers to be the salesmen most likely to succeed in the business.

Sixty-seven salesmen of a closely supervised sales force of two branches of a bakery company, operating on the house-to-house sales basis, gave the following replies:

- 61% definitely believed an increased amount of supervision would increase their selling efficiency.
- 31% thought maybe increased supervision would help them.
- 8% did not believe increased supervision would help them.

Seventy salesmen, scattered throughout the United States, representing a floor surfacing sales company, replied to the same question as follows:

58.5% definitely believed an increased amount of supervision would increase their selling efficiency.

21.5% thought maybe an increased amount of supervision would increase their selling efficiency.

20% believed an increased amount of supervision would be of no help in increasing their selling ability.

The replies of more than half (53 per cent) of 135 salesmen selected at random and engaged in various types of selling in the Ohio and neighboring states, in answer to a slightly different question, "Do you desire more supervision than you are now receiving?" was a definite "Yes."⁶

Conclusions of Chapter III

The view that salesmen do not want supervision seems invalid when considered in the light of available evidence. As the body of evidence grows, in both degree and depth, it may be assumed that the view will become increasingly less valid.

It also seems obvious that individual replies to field questionnaires could logically be expected to be

6 Charles L. Lapp, Personal Supervision of Outside Salesmen, Ohio State University, Columbus, Ohio, pp. 7, 8 & 9, 1952.

shaped by the individual's desire for supervision in the past. If this conclusion is sound, then a steady over-all increase in the quality of field supervision should elicit an even more favorable desire for increased supervision in the near future.

Summary Chapter III

Today it appears that a slowly growing body of thoughtful, forward looking sales executives are becoming aware of the importance of effective field supervision. In the sales field, manpower has been ruthlessly squandered for years. The philosophy has often been, if a man doesn't make good, just hire another one. During World War II, company after company learned to maintain their sales, and in many cases, to sell a larger volume, with a smaller sales force. This desire for more economical selling carried over to the post war and current era. Some companies have been able to maintain a larger volume with one-fourth to one-half as many salesmen. There seems, however, to be a growing awareness of the costly waste of a high turnover in salesmen, but there needs to be a greater realization that a large and measurable amount of this turnover can be a result of inadequate supervision.

If sales volume decreases, there will doubtless be a tendency to pack sales forces with additional manpower,

even though such a policy has met with questionable success in the past. Guidance of many so-called unsuccessful salesmen may be much cheaper than the cost of hiring, training and firing large numbers of men just because others are available.

One sales authority estimates that the average salesman, no matter how competent or well trained he may be, utilizes only sixty per cent of his potential capacity to sell. The other forty per cent represents lack of know-how, laziness, lack of determination, and other factors inherent in most of us, which must be corrected to secure maximum results.⁷

To develop the forty per cent of latent capacity in his salesmen is the major responsibility of the sales executive. In the final analysis every sales executive is a teacher, and the greater his efficiency as a teacher the greater his efficiency as an executive. This alone should be sufficient to challenge marketing executives to improve the supervision of their salesmen.

7 John C. Aspley, Sales Managers Handbook, Dartnell Corporation, Chicago, Illinois, p. 878, 1956.

Chapter IV

SELECTION CRITERIA FOR SALESMENIntroduction

The marketing executives who have accepted the need for, and importance of, a program of adequate sales supervision will first need to consider, and then define, their program's general and specific objectives.

In general, effective supervision has a three point purpose. First from the stockholder's, or owner's, view it should serve primarily as an aid to increasing each individual salesman's contribution to net profits. Secondly, it should aid in improving service rendered or merchandise value received by the ultimate consumer, and third it should aid each salesman in his efforts to maximize his selling abilities, thereby increasing his income and helping satisfy his psychological contribution to his firm's overall efforts and to society in general.

These three views are not only compatible, but are actually complimentary. All three objectives can be accomplished only by the creation of a profitable sales volume. Both management and salesman alike must realize that improved selling technique, resulting from carefully defined and well managed programs of supervision, will conclude increased income, not only for themselves, but for their firm and stockholders as well.

Specific Techniques

The specific techniques for achieving the objectives of an effective program of supervision will vary in detail from one firm to another, but the following six point program is believed by this author to be flexible and inclusive enough to fit almost all sales organizations:

- (1) Selection
- (2) Continued Training
- (3) Field Management
- (4) Morale
- (5) Motivation
- (6) Flow of Responsibility

This six point program of specific technique will be considered one step at a time. The balance of this chapter will be devoted to an analysis of the first technique, selection.

Selection of Field Personnel

The first objective must obviously be the proper selection of the field personnel. One of the principal tasks that confronts the marketing executive is that of constantly improving his sales force. Much thought and effort are given to training methods and to proper supervision, equipment, sales aids and the advertising program.

But the basic ability and intelligence of the man selected establishes forever a constant upper limit to what can be accomplished after he is employed. Unless he is properly selected, therefore, he cannot be developed beyond a certain limit; a limit which all too often falls far short of that required to maintain a satisfactory level of sales production. For this reason sales managers are now giving increased thought to the problems of securing the right man for a given job in an effort to partially solve the vexing problem of reducing the costs of distribution.

The costs of distribution affect the sales department in many ways. If the costs incurred by an individual firm are higher than those of its competitors, such costs must be offset by lower costs of production or physical distribution if the company is to compete effectively.

Costs of Poor Selection

There are also certain distinct losses which occur as a result of poor manpower selections, and these should be kept in mind. One such loss is the high turnover which must follow poor selection. If the man employed does not have the proper physical and mental facilities, or if his background of experience and training is

inadequate, eventual separation from the firm is inevitable. If he does not have the proper attitude toward sales work, if he lacks personal initiative, drive or courage, or if family or personal problems take too much of his thought and time, success is unlikely. If selection methods can be used which will aid in determining such limitations in advance, turnover rates may be substantially reduced.

An excessively high rate of turnover within a given firm obviously involves a number of costs. First, the expense of hiring and training is increased merely because it is necessary to repeat the process many times.

Training costs per man vary as widely as the products of the firms who do the training. One text of Sales Management outlines a range of as little as \$100.00 per man to programs involving an expenditure of \$2,000.00 or even more.⁸ It should also be remembered that the salary of the man being trained is one cost; however, an even greater cost is usually the salary of the executive who is carrying out the program. Although it is impossible to measure the costs of disrupting their daily duties to take

8 Harold Maynard and Herman Nolen, Sales Management, Ronald Press Company, New York, p. 230, 1950.

part in training programs, it is usually recognized that adequate training draws upon the time of a number of executives whose time is valuable.⁹

Another important aspect of the cost of poor selection is that one never knows how much is lost by employing men who are just below the level of effectiveness, which would have resulted from more effective selection methods. Present methods of territory evaluations have not gone far enough to enable a sales statistical department to say that one man is getting all he should from a territory or that another man is not working effectively. Much has been accomplished in this direction, but it is still not possible to say just what the effect would be if every man were well adapted to his territory, products and his particular customers. When this is not done, a group of men who are thought to be effective but, who in reality, are only performing at a fraction of total effectiveness are carried indefinitely. Both the men and sales management are satisfied because they never know what the results would have been had the men been selected

9 E. C. Halsey, Supervising People, Harper and Brothers Publishers, New York, p. 71, 1953.

with more care and with the use of modern selection technique.
10

Another cost to be considered is the effect of a high turnover of salesmen on the prospects or customers. Few men, when new in a territory, work as effectively as they do after they have become accustomed to the products, their uses, resale conditions and customer attitudes. New men often destroy good will which has been patiently built over the years with the expenditure of much time and effort. Since they frequently do not know how to meet objections, make adjustments, or do creative sales work, the customers often resent their coming. For these and other basic reasons, this is perhaps an area of field supervision of utmost importance. Even friends of the firm of long standing may resent the coming of new salesmen, particularly if his products are complex, or technical, and lack of knowledge prompts inadequate or even foolish statements about his or competitive products. All such mistakes involve a heavy loss of good will but cannot be measured by any accounting procedures.

A further cost of poor selection and one which emphasizes the positive aspects of selection is that ineffective performance disrupts the work of other departments

within the firm. If a salesman is not tactful in securing credit information or in making a collection, he not only makes his own work harder but also decreases the effectiveness of the credit department. If he takes the point of view of the customer, who has been refused an adjustment or the privilege of cancelling a contract, he may intensify the customer's feeling that he has not been given proper treatment.

All the good effect of direct mail advertising may be lost if the salesman cannot carry out his part of the sale. Preliminary and often favorable attention has been given to the product by the buyer through advertising. Poor sales tactics may destroy such good will in a few minutes, even though the advertiser has been months, or even years, creating it. The result is that the advertising department is often unjustly criticized for ineffectiveness when the real problem is with the territory salesman. Similarly, if the production department has been given a schedule and has provided machinery, raw materials and labor to produce according to the sales forecast and sales do not follow as planned, loss is inevitable even though the production department has performed its duties with marked efficiency. Since selection

is so important it now seems pertinent to ask two questions. First, who should do the selecting, and second, what techniques can be employed to increase selection effectiveness.

Who Does the Selecting

The size and type of organization determines to a large degree who carries out the process of selecting salesmen. If the organization is small and a new man is needed only at very infrequent intervals, the president or general manager usually hires new salesmen, just as he does other employees. Usually he is not guided by any technique other than that which he has learned by experience. Often he may know a young high school, or college, man in the area who has impressed him as being a good type of sales prospect and he is hired without much formality. The young man is often assigned to other initial duties even though he is destined for an eventual trial at sales work.

When the organization is somewhat larger, the sales department assumes the entire duty of selecting new salesmen. It is often guided by policies laid down by the president or the board as to whether experienced or untried men will be hired or how much may be paid to them, but the details are handled by the sales manager himself. Sometimes

this function is assigned to division or district managers, but the sales manager usually makes final approval of the men.

Still larger organizations have personnel departments serving all divisions of the business. One duty is that of selecting and sometimes training salesmen. The personnel department confers with the sales manager as to policies, type and number of men to be selected, but actual interviews, tests and all preliminary¹² selections are made by the personnel department.

If the policy is that of recruiting relatively untrained men from the colleges by advertising or from employment offices, the personnel department is a particularly valuable aid to the sales manager, for it can sort over the applicants and bring only the best to the attention of the sales manager. But when only a few trained experienced salesmen are added, the sales manager usually carried out all of the steps himself.

Techniques Employed in Selection

Once it has been established who is to be primarily responsible for selecting new salesmen, it then becomes necessary to look at the methods or techniques to be employed.

12 Harold H. Maynard and James H. Davis, Sales Management, Ronald Press, New York, p. 222, 1957.

Forward-looking sales executives are rapidly adopting the four point selection techniques first developed by the manufacturing industries. This involves, (1) first a job analysis, (2) second a job description, (3) third enumeration of job specifications and (4) fourth the worker's qualifications. The essential logic of this selection technique appealed to many sales managers and its adoption has met with notable success in thousands of instances. The progress in this area is encouraging because most students of marketing seem to believe that adapting the job and the man to each other is the first step in reducing the costs of distribution.

The Job Description and Specification

The idea is almost deceptively simple. It is that of analyzing a job, a task or occupation to determine just what an individual does. What are his duties? The job specification will outline what he needs to know, what education, what tools or aids are used and what special qualifications are demanded, such as those essential for its performance.

It may be said that all this has been done for centuries and, to some degree, this may be true, but unless a formal analysis is made and the results put into

form for use, often by others than the analyzer, the modern concept of a job analysis has not been met.

The Elements of a Job Description

Sufficient literature is now available concerning sales job descriptions to permit a statement of the elements which seem to occur in almost all such analyses.

- (1) The title used, usually salesman.
- (2) Range of age.
- (3) Physical requirements, such as the ability to carry heavy sample cases, or drive for extended periods of time in a light automobile.
- (4) The education level.
- (5) Experience required or preferred.
- (6) Conditions, if any, which make the job difficult; such as securing new accounts under difficult conditions or a low ratio of sales to calls made.
- (7) The type of selling.
- (8) The customers called on.
- (9) Other job details, instructions in retail and wholesale methods, installation of displays, location of new prospects, amount and kinds of reports to be made.
- (10) Opportunity for advancement. Does the job logically prepare for one of greater opportunity? What are the pay ranges for the jobs ahead?

When such an analysis is made, great assistance is given to the individual who selects salesmen. He can see at once some of the factors to be considered. If the most essential factors are incorporated in a man specification blank, the selector's task is easier. Such a form states the requirements as to minimum age, education, experience, absence of physical handicaps, etc. which applicants must meet. Thus, a picture of the man who can be expected to do well in the job is available. Its value in hiring is obvious.

The Job Analysis in Training

Job analysis is a guide in developing training for the job. A logical training program can be developed only when the analysis sets forth the duties to be performed, plus what men of the minimum educational or experience requirements will bring to the job. If a knowledge of cost accounting is essential, and if the man's specifications states that only college graduates can qualify, the task of the training department becomes that of giving the man the special knowledge of cost accounting which the job may require, since it may be assumed he knows the general field.

If the analysis shows that a salesman of aluminum ware must be able to cook simple meals for demonstrations

the training department must either teach that skill or test for its presence.

The Weighted Application Blank

Closely coupled to the job analysis as an important selection tool is the modern concept of a weighted application blank. Many selectors of salesmen find great value in the weighted application blank, one of the newer tools of the selection process. The principle is that of first ascertaining the relation between certain objective facts in the backgrounds of a rather large group of salesmen and the success obtained by each. When the importance of each factor, such as age, home ownership, or graduation from a college of pharmacy is determined, it is given a certain weight. A study of the lowest factors in the sales force will indicate the lowest minimum score which was made by the marginally successful salesmen. After this is done, new applicants are not hired unless they make at least this minimum score. If an exception is made, the action must be fully justified.

Objective Measures

Although the principles involved are simple, the procedures for selecting the objectives to be measured that predict success will vary in accordance with the particular selling situation. The first step constitutes selecting a group of salesmen with well-established records, a group large enough to be considered a valid sample, and divide it into three, four, or five sub-groups on the basis of their selling success. This division may be new accounts opened, the sale of profitable items or perhaps the ratio between total direct selling costs and sales volume. Records alone may be used, or combined with the judgment of supervisors, divisional or regional managers. The most commonly used objective measures age, height, weight, education, time with present employer, membership in various organizations, life insurance, or savings owned or other similar items.

Determining the Weight of Factors

The next step involves testing the degree to which each objective fact is related to sales success as indicated by the group into which each man falls.

Thus it may be discovered that there is a definite relationship between entering age and success or failure, between education and sales success or between such other factors as home ownership or type of formal education and sales success. Factors such as working one's way through college, birth in the country, or holding office in various organizations may be found to be of little significance for work with one company, but of considerable predictive value for another company whose sales situations are somewhat different.

After the objective factors which bear on success have been determined by the study of the records of the current sales force, only those factors which indicate success or failure are used in weighting the facts on the application blank.

The only significant factors seem to be those which assist in separating the good from the poor salesman. Samuel Poliak in his booklet, Rebuilding The Sales Staff, has suggested that although as many as fifty or sixty factors may be weighted, a far smaller number, often no more than twelve to fifteen can normally be used. ¹³

13 Samuel Poliak, Rebuilding The Sales Staff, McGraw Hill Book Company, New York, p. 132, 1947.

Once the factors to be used have been decided upon, it is then necessary to assign a weight to each. The weights are determined by correlating each item with the degree of success it predicts. Thus, if a company's records show a close relationship between entering age and success, a relatively high weight is given to the entering age level. But if age does not seem to be predictive, that is if success can be obtained with equal ease regardless of entering age, little weight is given to age.

Do Weighted Blanks Work?

The weighted blank works, and works well, which seems surprising when one considers that the factors which are measurable are not those considered the most predictive of success. Motivation, for example, cannot be measured, except in an abstract sense, and a weight assigned to its various manifestations. Yet modern analysts of successful salesmen invariably attach great importance to the presence or absence of the right kind of motivation for selling. ¹⁴ The other qualities which one associates with good sales personality, such as

14 Norman L. Munn, Psychology, Houghton Mifflin Company, Boston, p. 127, 1946.

liking to be with people, persuasive ability and a high drive for power and position are not usually considered subject to being measured and weighted. It should be emphasized that this new device should be used with reservations - but used it should be. Its limitations lie in the fact of its decisiveness and its inability to take into consideration those human personality factors which must be considered in the over-all selection process if a successful program is to be obtained.

Summary

Chapter IV has been devoted to a discussion of the importance, methods, and technique of selection of field sales personnel. Selection has been indicated first, for rather obvious reasons, in a list of six specific techniques for the attainment of an effective program of sales supervision. Earlier in this chapter mention was made of the fact that the basic ability and intelligence of men selected establishes forever a constant upper limit to the individual's performance after employment. This fact gains added significance if the firm in question follows a practice of internal promotion, for eventually every level of management from the

basic unit of supervision to the highest policy making office must remain confined within the limits initially set by the standards of employment selection. This alone, it would seem, should serve as adequate stimulus for marketing personnel to stress effective techniques in their selection process.

Chapter V

CONTINUED TRAININGIntroduction

Mary Parker Follett, in her text Freedom and Coordination, has aptly described the importance of continued training as follows:

The best leader does not persuade men to follow his will. He shows them what is necessary for them to do, to meet their responsibility, a responsibility which has been explicitly defined to them. Such a leader is not one who wishes to do people's thinking for them, but one who trains them to think for themselves.

Indeed the best leaders try to train their followers themselves to become leaders. ¹⁵

Evaluating The Need For Continued Training

If the field sales manager is to achieve his objectives through the efforts of other people, he must first of all know how these people are performing, both as a group and as individuals. To determine how his salesmen are performing as a group and individually, the supervisor may avail himself of a large

15 Mary Parker Follett, Freedom and Coordination, American Management Association, New York, p. 314, 1960.

quantity of records and reports of performance as well as individual observations.

These reports, records and historical data may then be equated against established standards in order to determine current levels of performance.

Having determined how his salesmen are performing, the supervisor must take a second step toward the achievement of his objectives through the efforts of other people. He must get each salesman to improve that which he is now doing correctly and to do correctly that which he is not.

This, in essence, is the subject of chapter V; the importance of continued training in an effective program of field supervision.

Basic Reasons For Continued Training

The previous chapter was devoted to a discussion of the importance of an adequate selection process in the formation of an effective sales organization.

Once selected the immediate concern of sales management becomes the initial training of the new representative. No effort will be made in this paper to detail the importance of this vital phase of management, or to formulate a specific plan for an all inclusive basic training program, since recognition seems

universal among marketing executives of the paramount importance of a thorough, well-planned basic training program.

The only major difference of opinion in this area seems to be the endless debating, both in and out of print, of the pros and cons of on-the-job training versus some type of classroom instruction as the best means of initial training. When these arguments give the impression that the two types of training are in opposition, or that one must be clearly superior to the other under all circumstances - they are misleading. Both types of training have their place in any well-organized salesman development program.

Individualized Continued Training

A systematized, well-organized program should be outlined for continued training, just as there has been for initial training in most major companies. The real work of making salesmen effective begins after they are placed in a territory. An organized program does not mean that training must be group rather than individual. In fact, the greater part of continued training should be an individual, on-the-job type. Such training requires an organized program of personal visits with each salesman. Training conducted in a mass or academic

manner is helpful. However, the benefits can be much greater if the classroom approach is supplemented by a supervised program for the personal application of what has been taught.

Since field conditions are constantly changing, the sales supervisor must also be constantly making changes in the guidance of his salesmen. Sales training to be truly effective must be tailored to each specific situation and each specific representative. A periodic check of the job duties, plus an evaluation of how those duties are being performed will provide a means of keeping abreast with each salesman's changing responsibilities.

The Reasons Continued Training Is Necessary

The selection and initial training programs provide a preliminary survey of a salesman's potential, and the long term manpower development program begins when basic training ends. The fact that product information, as well as application, sales procedure, and the manner in which a sales presentation should be made, were once taught is certainly no assurance that salesmen will continue to put into practice that which was initially learned. Once a successful procedure is learned, whether it is a method of approach, a demonstration technique, or

a closing procedure, a salesman may not continue its use. This constitutes, without question, one of the most frustrating aspects of management for supervisors. One by one, a salesman replaces a proven technique or takes short cuts which he thinks will make his work somewhat easier. This gradual de-training process, which seems to a greater or lesser extent to occur with all salesmen, is the basic reason all salesmen must be constantly and continuously trained. An increasing degree of emphasis must be placed on individual training as each salesman matures, as no two may need help in the same areas. A salesman attending a convention or a group sales meeting in which a considerable amount of time is devoted to a discussion of familiar products or ideas often reacts by declaring, "All they do is go over the same old things." The part of the program that really seems important to him are those areas in which he feels a need for specific help.

The editors of Purchasing Magazine asked purchasing agents, "Do you consider the salesmen now calling on you better qualified to give you not only the necessary information on their products, but details of new products, procedures, etc. than ten years ago?" Thirty-four per cent of the purchasing agents replied

that salesmen calling on them were less qualified than
 ten years previously. ¹⁶ This seems a sad commentary
 indeed about the effectiveness of many firms' continued
 training programs - or lack of them.

Four Point Constructive Training

Simply checking or "overseeing" a salesman's work will not necessarily bring about an improved sales performance. An effort has been made throughout this study to emphasize the fact that supervision in order to be effective must be positive and constructive. The trainer should never say to a group of salesmen, "You are making improper sales presentations." The constructive approach is one in which the individual salesman is shown his shortcomings and how to improve. This effort on the part of the trainer should be a continuous four point program.

First: The supervisor must anticipate and keep abreast of all new problems his salesmen constantly face. This will demand a sympathetic understanding, in the field of each new problem as it occurs, as well as a detailed knowledge of competitive activity and general market or territorial conditions.

16 "Is Today's Salesmanship Equal To The Job,"

Purchasing Magazine, p. 57, August 1958.

Second: He must determine how these problems can best be solved.

Third: The salesmen must be taught how to meet and solve the problems.

Fourth: The supervisor must continuously follow up to make certain the technique suggested is being used.

Ten Point Field Training Program

Universal agreement among students of marketing and sales executives seems to exist concerning both the difficulties of continued field training, and the inherent rewards of a well-managed program. In the Handbook of Sales Training, the National Society of Sales Training Executives suggest an excellent ten point program for the guidance of supervisory personnel in the execution of a field training program. This program is quoted in full below and is believed by this author to represent an effective outline for all personnel charged with the responsibility of field training.

(1) One of the purposes of training is to teach salesmen to plan a day's work. They should be shown how to do it better, when necessary.

(2) Check salesman's equipment before starting the day's work. Teach him the habit of making sure he has everything he needs before he starts out. Show him how to pack it neatly in his car.

(3) Check his briefcase for the same reason. Be sure he takes it with him on every call.

(4) When you want the trainee to do something, don't tell him to do it. Ask or suggest that he do it. Human nature resents commands.

(5) Don't dominate. The best way to make yourself important is by helping the other fellow succeed in his job. That makes you really important to him, makes him like you and want to cooperate with you.

(6) When you are working with a man to observe how he operates, don't let him introduce you as his supervisor or by any other title that puts you in a position above him.

(7) Keep the trainee's interest in learning alive.

(8) To succeed in training, you must be very patient. You must also be understanding, be able to see the other fellow's point of view and appreciate his problems. You need to be tolerant and tactful.

(9) At the same time, be firm in matters of policy and established procedures.

(10) Be thorough in your reports about the men with whom you work. Above all, be honest and frank. Give the men all the credit that is due them. Indicate additional help that is needed.

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Building On Strengths

To the specific ten point program listed above one general statement might be added. When each individual salesman was employed, the step was taken because after careful consideration, it was found that he possessed certain qualifications - knowledge, skills, experience, personal attributes, etc. - which seemed to fit him well for the particular sales job in question. Along with these strengths, of course, he had certain weaknesses, and management was not unaware of these when he was hired. It seems a rather obvious mistake to devote the bulk of the field sales training in an attempt to correct these weaknesses since at the date of employment his strong points were no doubt considered

important enough to compensate for his weaker points. It would seem more sensible, therefore, to spend the greater part of the field training time helping the representative utilize his strengths as quickly and effectively in the job as possible while improving weaknesses.

Conclusion and Summary

The major objective of this chapter has been to define the importance of a positive program of continuous field training. To this end a detailed discussion of the need for such training was examined and a specific ten point program outlined. Continued emphasis has been placed throughout this chapter on the importance of building on the individual salesman's strengths, rather than his weaknesses.

Chapter VI

FIELD MANAGEMENTIntroduction

Chapter V was devoted to a discussion of continued training, which by any practical consideration cannot be entirely divorced from the management function. For purposes of this study, however, it seemed best to separate continued training and field management into two specific areas in order to undertake a more detailed analysis of each.

Field management, by definition, is concerned with two general aspects of the distribution function, one - Planning and two - Control.

Some authors choose to add at least one other factor, organization. This seems a rather fractional definition, though, since organization is inherent in both planning and control.

Planning is a method of looking ahead--a constructive reviewing of future needs in order that present actions may be adjusted in view of the established goal. Planning, at least some kind of planning, must always take place before doing. Most individual and most group efforts are made more efficient by determining

before any action takes place what shall be done, where, how and who shall do it.

Control is a composite of the following four basic functions.

- (1) Establishment of Standards
- (2) Report Back, or Effective Communications
- (3) Evaluation of Performance
- (4) Corrective Action

It will have for its object pointing out weaknesses and errors in order to rectify them and prevent recurrence. It must then operate on everything; things, people and actions.

Basic Field Responsibilities

The basic responsibility of the sales supervisor is to direct the activities of his salesmen to secure the maximum, or optimum volume of sales within the objective and policy framework established by executive management. Within this simplified description of the sales supervisor's job lies a multitude of complex responsibilities which call for aptitudes and talents far beyond those suggested by the simple phrase "keeping the salesmen selling."

Later in this text emphasis will be given to the thought that superior performance as a salesman is frequently the major (and all too often the only) criterion used in selecting men to the ranks of sales supervision. Rarely does the salesman on his way to becoming a supervisor have the opportunity to develop skill or experience in the complex functions of planning and control, which are at the heart of the management job. Once he is a manager, he must pursue his objectives largely through the efforts of other people. He must quickly learn to do those things which cause others to want to take action in predetermined directions for predetermined purposes. In short he must lead his group toward the assigned objectives. To these ends, the supervisor must practice the technique of laying out the work to be done, assigning this work to the people who are to do it, and then taking the actions required to see that it is done properly. These, in the simplest of terms, are the management functions of planning and control.

While it is useful for purposes of discussion to regard these two functions as separate and distinct kinds of activity, it seems equally important to recognize that, in practice, no such obvious separation exists.

The management functions of planning and control overlap and are inseparably joined. Supervisors must, therefore, find themselves performing both functions concurrently

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Planning Activities

Planning, simply stated, is the basic mental process which precedes all purposeful action. It is the studied determination of goals and objectives, and of the nature and timing of the actions required to achieve those goals and objectives. It is, in total, the work any manager does to identify and establish desirable courses of future action for the people in his group.

In its most complete and perhaps most idealistic form, the planning process should include all of the following five functions.

(1) Setting Goals. The establishment of specific quantitative goals toward which all the efforts and activities of the organization will be directed.

18 For a complete and somewhat detailed discussion of planning activities see, H. H. Maynard and James H. Davis, Sales Management, The Ronald Press Company, New York, pp. 127-197, 1957.

(2) Budgeting. The allocation of total resources, money, all materials, manpower and all facilities required to achieve the objectives established.

(3) Programming. The determination of specific activities that will need to be performed, and the exact sequence in which they will have to be performed.

(4) Establishing Methods. The devising of methods to be followed and means to be used in performing the activities required to achieve the objectives established.

(5) Scheduling. The determination of the exact points in time at which each programmed activity should begin and end.

At first glance the five factors of planning presented above may seem somewhat academic. It is suggested, however, that collectively they represent little more than the considered actions of most capable decision makers.

Requirements of the Plan

Plans must be put into writing to be meaningful, useful and clearly understood. Beyond this basic and rather obvious requirement there seems little consistency

or general agreement between one company and another, or frequently between the several segments of the same company. Although consistency in the usage or wording of the physical form plans take may seem rare, at least certain elements seem common to all plans which have proven effective management tools.

Dr. Robert T. Davis, in his detailed study of sales management in the field, lists the following nine basic criteria by which an effective sales plan may be evaluated.

- (1) Are the objectives clearly and unequivocally stated in quantitative terms?
- (2) Are the specific objectives to be performed, and the sequence in which they are to be performed, indicated clearly?
- (3) Are all necessary and related elements included?
- (4) Are the points in time specified at which each activity should begin and end?
- (5) Are all elements of cost (money, materials, manpower, and facilities) budgeted?
- (6) Have formal criteria been established for measuring and evaluating progress? Is the evaluation procedure specified?

- (7) Are alternative courses of action provided for?
- (8) Has provision been made for periodic re-planning?
- (9) Are means of communicating the plan to the organization specified. 19

These nine basic criteria seem to be an excellent guide list for the evaluation of the adequacy of any formal plan.

Broad Framework of All Planning

The planning function of the sales supervisor begins with the establishment of specific goals and objectives for that portion of the field sales force under his direction. Since the field subdivision is a part of the total sales organization, its objectives must be designed to fit within the framework of the over-all objectives of the organization as a whole.

Planning at the field level must be confined within the somewhat inelastic boundaries usually referred to as company objectives and company policies.

19 Robert T. Davis, Performance and Development of Field Sales Managers, Harvard Press, Boston, Massachusetts, p. 61, 1957.

Company objectives and policies are, therefore, the starting point for all sales planning, and the supervisor must have both a detailed and comprehensive understanding of each plan, however adequate its formulation, if it is to meet with success. To this end, management must insure that all pertinent information is available to its field supervisors through an organized system of communications.

The Supervisor's Role in Planning

The boundaries of responsibility for the supervisor's sales planning will normally be constrained by company policy and further limited by the extent to which such planning is performed at the home office. This will, quite obviously, vary widely between firms.

Regardless of the wide variance in the planning function between firms, in the end, the final responsibility for interpreting the resulting plans in terms of local conditions and accomodating them to local needs must be borne by the supervisor. The amount of field sales planning performed at the home office level may limit the extent to which the field sales manager is involved in certain areas of planning; it may even limit the degree to which he is able to interpret and adjust

the plans established but, to some degree, he will always be involved in almost every major area of field sales planning; either through active participation in the initial planning process or through the translation of home office plans into action programs designed to meet the particular need of his own segment of the market and his own sales organization.

There are five major types of planning in which the sales supervisor will ordinarily be engaged and they are:

- (1) Field Sales Forecasting
- (2) Planning Territory Organization
- (3) Planning Territory Coverage
- (4) General Budget Planning
- (5) Program Planning

Each of the five major areas listed above will be discussed briefly.

(1) Field Sales Forecasting

The planning process begins with the establishment of specific, quantitative goals toward which all the efforts and activities of the sales organization will be directed. In order to establish such goals, it is

necessary first to determine the volume of sales which can reasonably be expected during the period for which the plans are to be developed.

In some companies the sales forecasting function begins at the home office level; in most, however, it begins in the field. Even among those companies in which sales forecasting is performed entirely at the home office level, it is commonly considered desirable for each sales manager to analyze his potential business, market by market, customer by customer and assemble his findings in forecast form.

Every field sales supervisor has at his disposal a widespread source of information, both current and historical, upon which he may base his sales forecast, principal among these data are the following five sources.

- (1) Records of previous years' sales for his unit of supervision.

- (2) Individual territory, and specific account sales records.

- (3) Information concerning local competitive strengths and weaknesses.

- (4) Specific knowledge of various local economic conditions expected to affect sales expectancy.

(5) An intimate first-hand knowledge of the plans of key customers.

All of the above locally available information must be carefully coupled by the supervisor with his basic knowledge of general business conditions. In addition, and perhaps even more important will be an intimate knowledge of his company's plans for the period ahead. It is the responsibility of executive management at the home office level to provide each supervisor in the field with this information.

For the purposes of this thesis a step by step analysis of all functions required in field sales forecasting is not important and the subject has been adequately discussed in a host of texts.²⁰ One aspect, however, the establishment of individual sales quotas, almost always remains the singular responsibility of the field supervisor.

All too often this vitally important function of supervision is performed in an off-hand, casual fashion. Both the motivation aspect and the group's

20 An interesting, comprehensive study of field sales forecasting is presented by D. Maynard Phelps and J. Howard Westing in, Marketing Management, Richard D. Irwin, Inc., Homewood, Illinois, pp. 238-266, 1960.

morale, which will be discussed separately in this text, are vitally affected.

Improperly established sales quotas based on inadequate, or inaccurate determinations of individual territorial potential, can, and often will be, a principal factor in the erosion of the organization's morale.

Dr. Harper W. Boyd and Dr. Ralph Westfall in their text Marketing Research have ably outlined the importance of this field function as follows:

Sales quotas should be set after market potentials have been derived and sales effort allocated. In other words, the procedure should be to establish market potentials; to allocate sales effort on the basis of these potentials; and then, considering past sales performance, changes to be made in the amount of selling effort during the coming year, and anticipated activities of competitors, to establish sales quotas. These are usually set for each sales territory and for each salesman. Quotas are ordinarily not the same as potentials or even of the same relative size. One market may have twice the potential of another, but may have local competitors that take a large share, so that a given firm's quota may be smaller there than in the area with lesser potential.

Sales quotas set in light of sales potentials furnish a much better basis for measuring the efficiency of salesmen than do quotas set by the old rule of thumb - last year's sales plus five per cent. If two salesmen turn in the same annual sales volume, they are usually paid about the same and are held in equal esteem by the sales manager. If market analysis shows salesman A to have a territory with far less potential than salesman B, the sales manager may wonder if salesman A may not not actually be superior. A shift of the two might lead to greater total sales. The accompanying table illustrates.

The difference in the percentage of potential obtained may be because of different abilities, concentration on different types of customers, different use of advertising, different frequency of call, etc. Further study should result in better results in territory B. 21

A COMPARISON OF TWO SALES TERRITORIES - WITH DIFFERENT POTENTIAL

	SALESMAN A	SALESMAN B
SALES LAST YEAR	\$ 448,000	\$ 450,000
TERRITORY POTENTIAL	1,164,000	4,034,000
PER CENT OF POTENTIAL	38.5%	11.2%

Source: Nielson Researcher, Vol., XIV (May, 1955), p. 6.

Unfortunately this academic recognition of a rather basic sales principle is seldom found to be the rule among field supervisors and the so-called "rule of thumb" seems to generally persist.

Among those sales organizations where this attitude prevails, top management must assume the responsibility for its ramifications. Field supervisors will, in general, be guided or directed in this activity by the importance, or lack of it, the firm's top level executives attach to this function.

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Planning Territory Organization

With the establishment of individual territory objectives, the next logical step is the formulation of an effective plan for working the area.

Designing an effective plan whereby each individual territory may be most effectively worked is a major responsibility of the field supervisor.

Selling efficiency, the total cost of distribution, customer service and the attainment of sales objectives are all strongly affected by the manner in which sales territories are designed.

22 D. Maynard Phelps and J. Howard Westing, op. cit.,
For an exhaustive study of determination of sales territories see pp. 595-617.

Since the nature of the selling function varies significantly from one firm to another, it is difficult to outline general rules for territorial planning which would apply to all with equal validity. The following basic principles, intended as a broad guide, in the opinion of this writer are applicable to all sales organizations.

(1) The headquarters of each territory should be located at the center of maximum customer concentration. Since salesmen spend most of their time where there are the most customers or potential customers, travel time and expense will be less if their headquarters are located at points of maximum concentration. In addition most companies require their salesman to live within a certain distance of their headquarters.

(2) Territories should be designed to minimize travel time and expense.

(3) Territories should be designed in such a way as to permit salesmen to devote an amount of time in each area commensurate with its sales potential.

(4) If possible, each territory should include some under-developed areas so that each salesman will have the opportunity and responsibility of missionary effort.

(5) Consideration should be given to the desirable frequency of calls to each type of account in the territory, the anticipated frequency of "call-backs," and the nature of the function performed on each call.

(6) Each salesman's work-load capacity should be determined through careful analysis, including appropriate provision for the various "non-selling" functions he is required to perform. When realistic allowance is made for holidays, vacations, week-ends, time spent in attending sales meetings, making special surveys and handling other special assignments, the 365-day calendar year may dwindle to 150-180 days of selling time. A salesman assigned a territory too large to be covered faces a frustrating task in an area in which the sales potential will never be reached.

Planning Territory Coverage

Planning the manner in which salesmen are to cover their assigned territories is equally as important as planning the territory itself. The key tool for such planning is a permanent itinerary. As this

plan is most frequently used, a salesman is asked to develop a permanent plan of procedure for working his territory. The plan should be for the period of time (4 weeks, 5 weeks, 6 weeks, or whatever) that it takes him to cover his entire territory once. The supervisor then reviews each salesman's plan to make certain it represents the most efficient method of covering his territory. In actual practice, the supervisor himself usually makes the plan for all new representatives, and often continues to aid in its formulation for older representatives.

The permanent itinerary is not a restrictive device. It should be regarded and used by the salesman only as a guide, and it must be sufficiently flexible to allow him to go where day-to-day changes in conditions warrant. The greatest benefit is derived when the permanent itinerary is regarded as the ideal procedure for working the territory - a procedure that is to be followed as closely as, in the judgment of the salesman, conditions will permit.

It should be noted that with the adoption of a permanent itinerary any time lost from the field is disregarded and no attempt is made to make up its coverage. For example, if town A were to have been

worked during the week of April 22 and the representative was ill this week, when work is resumed on April 29 the current area of the permanent itinerary, town B, will be worked allowing town A to wait its proper turn.

Without the adoption of this principle (and its adoption does not seem universal) the first work interruption invalidates the principle of a permanent itinerary, or at the least requires that it be reconstructed.

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General Budget Planning

Budget planning entails the administration, control and forecasting of sales expenses in the field. When this is done with a reasonable degree of accuracy it becomes an invaluable tool for top management. This planning is usually the determination and allocation of all resources necessary to achieve the established sales objectives. In its simplest terms, it consists in

23 A brief but detailed study of budget control is presented by Ralph Currier Davis in, Industrial Organization and Management, Harper and Brothers Publishers, New York, pp. 864-873, 1957.

(1) placing a cost element on all controllable elements of money, manpower, materials, and facilities that will be expended in attempting to achieve the objectives and (2) establishing the standards which will form the basis for controlling expenditures in the operations of the field unit.

The field supervisor's responsibilities for expense planning usually encompass two broad areas, manpower and travel, or field operational expenses.

Supervisors are frequently required to submit proposed manpower expense budgets on an annual basis. The chief virtue of a manpower salary budget system is that it provides a sound basis for predicting, and hence for controlling, manpower expense. Factors affecting the size of salary budgets will vary, of course, from one company to another according to the nature of the compensation policies pursued.

In addition to the manpower budget many supervisors are required to submit a detailed travel, or operational budget for his unit of supervision. Usually this entails an estimate of the travel expense (including transportation costs, the costs of

meals, hotel accommodations and entertaining expenses) which each salesman is expected to incur in covering his territory according to his permanent itinerary. In making such estimates, the supervisor will find it helpful to refer to travel expense records of previous years. Whatever the supervisor's approach, it is important that, after provision is made for all known elements of expense, suitable allowance be made for contingencies. If the travel expense budget comes to be regarded as a restrictive device by the salesman, he may tend to consider expense first and sales opportunity second - a viewpoint, surely, which few sales managers wish to encourage.

24

Program Planning

Sales program planning is the very essence of the field sales supervisor's job. Reduced to its simplest terms, sales program planning consists of determining what each salesman must do and where and when he must do it if the objectives of the field sales unit as a whole are to be achieved.

24 The reader may choose to refer to the following text on the theory of planning for a definitive discussion of this topic. Preston P. LeBreton and Dale A. Henning, Planning Theory, Prentice-Hall, Inc. Englewood Cliffs, New Jersey, 1961.

Although the supervisor may receive considerable support and guidance from his immediate superiors and the home office in the form of merchandising programs, advertising and promotion campaigns and the like, such support does not relieve him of the responsibility of sales program planning. His responsibility entails developing an action program for utilizing this home office and other support in a manner designed to specifically fit the needs of his particular field unit.

The degree to which the plan will be effective will depend, of course, upon the degree to which it is accepted. The salesmen who must carry out the plan must understand it, believe in it, and know the relation of their part to the whole. Since salesmen, as previously mentioned, are subject to much less direct supervision and control than their counterparts in other areas of the company, the need for effective communication of plans and objectives is especially urgent in the field sales organization.

25

Control Activities

We now turn to the second aspect of field management; control.

25 For a broader review of control activities see, Ralph Currier Davis, op. cit., pp. 379-570.

As used in this text, control is intended to mean the management function of determining whether plans are being properly carried out, and if not, taking the necessary action to correct the situation. This term was selected (for lack of a better one) after much thought, and even then with some reservations since it has strong connotations of domination and restraint and is an extremely negative word. The management function which it is intended to identify, however, is more positive and more complex than the word would seem to imply. The control phase of field management involves four kinds of positive and distinct activity:

- (1) Report of Performance
- (2) Evaluation of Performance, as reported, as opposed to what was expected
- (3) Evaluation of Variances
- (4) Evaluation of Corrective Action

No detailed analysis of these four important steps in the control phase of field management will be attempted; however, a few words to outline the author's position seems in order.

It appears generally recognized that a primary function of supervision is evaluation of performance; evaluation of performance of the sales unit as a group, and evaluation of each individual representative. Because most field sales activities are so closely related to one another, both in performance and in effect as to be virtually inseparable, the evaluation of performance in any one area usually provides a valid measure of performance in many others.

When the evaluation of performance indicates a major variance in one or more areas, this will usually necessitate exploration of all major areas to determine the causes and seek clues to the corrective action required.

Corrective action will then become the end result of the control phase of field management. Unless appropriate corrective action is taken when indicated, the evaluation of performance and evaluation of variances is meaningless.

When the needs are made apparent to the individual salesman, corrective action is often self-generated. When variances are promptly identified and properly called to the attention of the individual salesman,

corrective action is frequently taken with no further effort on the supervisor's part. When this does not happen, however, each variance must be carefully analyzed to determine its cause or causes and appropriate corrective action directed by the supervisor.

Summary

This chapter has been devoted to one of the most important aspects of field supervision - that of field management. By definition alone this seems rather obvious since field management is the heart and essence of supervision as defined in this text.

Throughout this chapter an attempt has been made to stress the positive side of field management and to this end the basic function was divided into two broad categories, planning and control.

Planning was defined and the specific role of the field supervisor in this area outlined. A specific five point program suggesting the role of the supervisor was discussed at some length.

The second phase of field management was defined as control and an analysis was made of the four evaluation procedures involved in its completion.

Chapter VII

MORALEIntroduction

Any discussion dealing with the broad general topic of morale would do well to begin with a definition or description of its meaning. For this purpose it may be well to examine the views of Dr. Ross Stagner as expressed in his text, Studies in Personnel and Industrial Psychology. To quote:

Morale, I think must always be expressed in terms of an individual group relationship; it is an index of the extent to which the individual perceives a probability of satisfying his own motives through cooperation with the group. Obviously, then, there is no such phenomenon as morale in general; the state of an individual's morale must be judged relative to some specific group, such as his company, his informal group, or his union.

Morale, to me, is not a meaningful term if the individual is seeking individual goals through individualistic action. At least from the subjective or phenomenal view, if he does not perceive himself as a member of a group, the term morale simply is not relevant.

Of course, he may be objectively a member of a group, as when he is an employee of a company; and so from an external point of view, we may speak of his morale as a part of the employing organization. In this case, if he is acting purely in an individualistic fashion, we must conclude that his morale is low.

High morale exists when the individual perceives himself as a member of a group, and perceives a high probability of achieving both individual and group goals through a course of action. He consciously seeks to achieve the goals of the group because these are important to him - they have become individual goals - or because they provide a pathway to his own personal goals which are not related to the group. ²⁶

This definition, by Dr. Stagner, which was drawn from a text on the morale of workers in the manufacturing industries, may at first glance seem strange and out of place in a paper dealing with morale in field sales organizations. The writer holds that this should not be so, however, and is in general agreement (as will be pointed out in this chapter) with the views

26 Ross Stagner, Motivational Aspects of Industrial Morale, The Dorsey Press, Inc., Homewood, Illinois, p. 304, 1961.

of Dr. Stagner considering the importance of viewing morale as primarily a group function.

The Vanishing Salesman

Often heard, and frequently seen today, is the phrase, "The Vanishing Salesman." This is usually intended to describe the changing responsibilities and functions of the modern salesman, not a numerical reduction in the total number.

As the total distribution function has become more complex within most sales organizations, the duties and functions of each of its individual members have likewise become more complex.

Today's salesman may well be charged not only with the basic responsibility of selling, but also with specific responsibilities in such broad areas as advertising, public relations, missionary good will, public speaking, special product promotion work and certain collection and credit functions to mention only a few.

As the tendency toward an expansion of responsibilities for the individual grows within the sales organization, so also grows his importance and responsibility

to the group as a whole. For this reason it will be the intent throughout this chapter to stress the importance of considering morale as a group function. This does not seem to have been the case in most writings considering morale in sales organizations.

Es'prit' de corps'

"The common spirit pervading the members of a group. It implies enthusiasm, devotion, and jealous regard for the honor of the group."²⁷

The hob nails of military boots clang through the streets of ancient Berlin - perfect unison - perfect stride - perfect posture - pride, real and genuine, radiates from every soldier's face; Hitler's finest troops are on the move.

No -- a spectre has not risen from the past, but this rather dramatic statement does serve to illustrate the point, es'prit' de corps'.

Since the days of the Roman Legions the military has always been aware of this powerful motivating force. Almost everyone is aware of one example of this. The

27 Websters Collegiate Dictionary, G. and C. Merriam Co., Publishers, Springfield, Massachusetts, U.S.A., p. 651, 1947.

coltish youngster inducted into the Marine Corps and told repeatedly and positively that he is a member of the greatest fighting force on earth, soon is a member of the greatest fighting force on earth.

Es'prit' de corps' should not be confined to the military. This useful, frequently neglected, and often underestimated technique of supervision should be pressed into service in every sales organization.

This may seem a naive and gross over simplification of a highly complex management function, but the goal itself is not complex and should not be allowed to become so.

After all, any improvement in individual's, and hence group morale, however slight, must by definition benefit every member of every organization.

The Five Basic Drives of Man

Daniel Starch in his book, How To Develop Your Executive Ability, has the following to say about the five basic drives of man.

There are five basic drives in human beings - five "I-wants-out" of which the whole drama of life springs:

- (1) Hunger - the need for food; in infancy the child cries out for it, in adulthood he strives to earn it.
- (2) Pain - the desire for comfort - bodily and mental well being.
- (3) Sex - the desire for a mate, home, children and companionship.
- (4) Action - the desire for power, achievement, control over things, forces and persons.
- (5) Approbation - the desire for approval, good will, and admiration of one's fellow men.

The latter two represent the broad area where through proper motivation the individual's morale may be elevated and sustained at a high level. ²⁸

The writer is in accord with the definition of the five basic drives of man listed above. For purposes of this study, however, the last two, Action and Approbation, will be sub-divided into three specific areas. These three areas will constitute the specific field in which it is believed the field supervisor may motivate the individual and group toward a desirable level of morale.

28 Daniel Starch, How To Develop Your Executive Ability, Harper and Brothers Publishers, New York, p. 100, 1943.

Three Most Important Motives for Supervisory Consideration

The author's field experience has demonstrated that there is often a marked contrast between what management believes to be the strongest motivating forces, and the relative importance which the sales force attaches to these same forces. When such a situation exists, it may usually be attributed to the fact that management has failed to analyze, understand, or properly evaluate the dominant motives which influence the attitude and the performance of the employees. It is, however, possible to identify the leading motives or desires which accompany the thinking of most employees as they consider the position they hold, and the degree to which it seems to make it possible for them to attain their goal in life.

The following three dominant motives are suggested as of paramount importance to all members of the sales organization.

- (1) Security
- (2) Opportunity
- (3) Recognition

No effort has been made to rank the three in order of importance, since the strength of each varies with the individual, and doubtless, from time to time in the thinking

of the same individual. It may be well to note that both security and opportunity are economic in nature and recognition is psychological. The latter may, however, be just as strong an influencing motive as either one of the first two. Each of the three dominant motives listed above will be discussed separately.

Security

The influence of this important motive may best be illustrated by a consideration of certain conditions of employment which permit the security factor to exercise either a good or a restraining influence on the performance of the salesman. It should be noted that each of these practices, or the failure to develop a policy on which sound practices may be based, has a strong bearing on the economic future of the salesman. Since it will readily be granted that he has just as vital a stake in his own economic security as has any other worker in the firm, the relation of the situation outlined below to the general level of morale is evident.

There seems little doubt that a desire for economic stability and personal security is a strong motivating force in human actions. Fear of what might happen should one's employment be terminated and natural interest in the postretirement period are expressions of a worker's legitimate concern for the economic security of himself and his

family. The development of annual wage plans came about because of the day-to-day fears of workers. Social security coverages, industrial compensation awards, and the growth of retirement provisions all grew from this basic urge for security.

Salesmen have in the past often been denied many of the benefits mentioned. Often they have been excluded from group insurance or hospitalization benefits. Many companies seem to have deliberately attempted to secure rulings which class their salesmen as "independent contractors" in order to avoid payments for social security benefits. The growth of pension plans for outside salesmen has been slow, as compared to similar protection for plant and factory workers. One study showed that in some organizations salesmen are specifically excluded from company pension plans.²⁹

Another major factor contributing to a feeling of insecurity on the part of many salesmen is the fact that many management officials follow practices which keep the men in an almost constant state of fear. The consequences of failing to meet one's quota are constantly

29 H. H. Maynard and Phillip McVey, Retirement Income Plans for Outside Salesmen, National Sales Executives, Inc., p. 9, 1953.

stressed. Salesmen often feel the complex statistical procedures of establishing potentials are only for the benefit of the company and therefore are but one more way of preventing them from obtaining their proper reward. Fear seems to create fear; situations which otherwise might not be noticed become important when a salesman works with the handicap of fear. He might find it difficult to analyze these fears, but they are nevertheless real. Perhaps the basic problem grows out of the necessity of making sales to hold one's job or to receive an adequate compensation. Fear does not seem to arise in this same way in inside jobs, since most inside workers are not under the compulsion to work alone and to secure satisfactory results almost entirely through their own unaided efforts, which is certainly true of the job of most salesmen. When management does not understand or appreciate these factors in the work of salesmen and does nothing to alleviate their natural fears, it is likely that the effect on the work of the men will be cumulatively bad. Inspirational letters, talks, and bulletins do very little to overcome this attitude when it has been created by unwise policies.

The field supervisor should lead his men toward a feeling of security based on certain beliefs about the conditions of their employment. When the men realize that favorable conditions of employment exist, as measured by such factors as compensation plans, supervisory methods, and clearly understood fringe benefits, their feeling of security will be greatly enhanced.

Opportunity

Salesmen, as other workers, feel they have the right to advancement if their efforts justify such recognition. The salesman believes that as he matures in experience and ability, corresponding increases in his financial rewards should be available to him. He therefore resents any practices which seem to indicate that the company has a policy of keeping the earnings of their men within a certain limit.

One of the best known examples of such a policy is the practice of reducing commission rates when sales increase. This may, of course, be justified when the increased sales are due to some factor completely beyond the salesman's control. A product may suddenly come into

general use, or a substitute may gain acceptance because the older product is not available. But even then, it seems questionable whether commissions should be reduced. Certainly they should not unless the salesman has been consulted and an agreement reached which is fair to both him and the firm. Similar in its effect is the reduction of a man's territory when sales increase to a certain level. Territory splitting may be justified under a company policy of intensive market cultivation, but the salesman should be consulted by his supervisor and an adjustment in earnings provided for, at least in the initial period in the smaller territory.

Equal opportunity is believed by all salesmen to be a prerequisite for fair employment. When the men feel that the potentials in their territory are low as compared to other territories in the same company, this basic premise is violated. Much can be done through effective supervision at this point by showing the men how potentials are measured and the relation of these potentials to the work of each salesman. Contests, for example, should always have a direct, and understandable, relationship to potentials.

Recognition

The third dominant motive, recognition, represents a form of psychological income and may well be just as important a factor in the establishment of a high level of morale as financial reward. A recognition of the justifiable "ego" of the salesman is an important method of enhancing the level of morale within the sales group. Recognition of work well done, of efforts to improve, or of similar progress made by the salesman is a thoroughly justified policy. If the men know that their supervisor notes their forward progress and shares with them in the pleasure of accomplishment, morale is improved. Thoughtful supervisors know that salesmen need this type of reward even more than do other workers, since their work is often performed at great distances from the factory and often under almost hostile conditions. Buyers can and do give many salesmen a cold reception. Salesmen are naturally prone to be discouraged and to feel that they have a very lonely, and perhaps even unappreciated job. In this connection, nothing is as powerful a stimulant or morale booster as a personal visit from a capable field supervisor. But if the supervisor conceives the purpose of his visit to

his men in the field as that of giving them constant stimulation and reprimands his visits may bear negative results. The effective supervisor knows he must lead, not drive.

Summary and Conclusions

This chapter has attempted to deal with a difficult, hard to define and extremely important subject - morale.

The thought (believed to be somewhat unique in a sales group context) was introduced concerning the importance of viewing morale as a group function.

Most salesmen belong to some unit of identification, even if it is no smaller than the firm in general. The development of a sense of es'prit' de corps' is suggested as a valuable, seldom used tool of supervision in the development of a satisfactory level of morale.

The five basic drives of man were outlined, and from them three dominant motives for supervisory consideration were formulated. These three motives, Security, Opportunity and Recognition, were discussed in detail.

Conclusion

A chapter on morale would seem incomplete, to say the least, without mention of leadership. In a small, rather unpretentious article entitled, The Field Sales Manager As A Leader, Dr. Samuel Stevens paints a vivid, and moving picture of this management function and its direct relationship to the subject of morale as follows:

Leadership at its best, wherever it is found, is always characterized by an indefinable something which can best be described by the single word "commitment." A truly human concern for the well-being of men inevitably results in management techniques and practices that create an environment in which the individual, even as he serves the interests of the organization, finds opportunity to fulfill his deepest needs. A by-product of great social and spiritual significance emerges from this process: It has to do with loyalty; it is manifest in the way the individual identifies his own needs and aspirations with the organization's goals and purposes; it is evident to competitors in the difficulty they experience in pirating good people away; it produces measurable profits in the form of suggestions for improvement, and

better work performance; it ultimately finds expression in the growth of better men for better management. 30

Note: In addition to the texts cited in this chapter, the reader interested in additional reading in the general area of morale in business, should see F. J. Roethlisberger, Management and Morale, Harvard University Press, Cambridge, Massachusetts, 1946.

30 Samuel N. Stevens, The Field Sales Manager As A Leader, The Ronald Press Company, New York, p. 84, 1953.

Chapter VIII

MOTIVATIONIntroduction

The fourth specific technique in the proposed supervisory program is motivation - perhaps a very brief definition of this function will help outline its importance.

Websters Collegiate Dictionary provides the following rather brief definition of the verb motivate.

"Mo'ti-vate: to provide with a motive; to impel; incite - mo'-ti-va'-tion, n." ³¹

Within this short definition lies the very heart and essence of the field supervisor's primary function, the motivation of the men under his direction - correct motivation may be a more apt description since motivation may take two directions, positive or negative.

This chapter will be devoted to a discussion of the positive aspects of motivation. The term positive aspects is not intended to preclude any steps toward necessary discipline which is, of course, frequently

31 Websters Collegiate Dictionary, op. cit., p. 341.

required from the sales supervisor. In fact, it appears to this writer that discipline, when fairly and honestly administered, should be considered a positive motivating factor. Most men appear to receive an increased sense of security from the firm conviction that their immediate superior knows both them and their territory well enough to correct any deviation from the expected path of behavior. Honest, reasonable and consistent firmness in discipline or restraint portrays a gesture of respect for and interest in the individual.

Negative motivation will not be discussed in detail because one primary tenet throughout this paper has been the emphasis on discussing the positive aspects of an effective program of sales supervision.³²

Mention should be made at this juncture, however, if only by way of definition, of what is intended or implied by the term negative motivation.

Negative Motivation

Negative motivation is quite simply, in this author's opinion, any action, direct or implied, which impels or incites action in a direction counter to the

32 For an interesting discussion on motivation see: Carl Heyel, Management for Modern Supervisors, American Management Association, The Riverside Press, New York, 1962.

best interests or outlined objectives of the sales organization.

Examples of negative motivation could be almost as endless as a list of possible human weaknesses, but a few of the most important and obvious would include the following:

- (1) Basic Dishonesty
- (2) Improper Personal Conduct
- (3) Disloyalty

More will be said in the last chapter of this paper about the reverse aspects of these three factors, since they will be discussed under criteria for the selection of supervisory personnel.

Positive Motivation

In order to motivate salesmen successfully, the sales supervisor must:

- (1) Thoroughly understand both company and local objectives.
- (2) Develop, or possess, the ability to equate each salesman's job against the objectives through job analysis and description.
- (3) Possess a deep respect for the human personality and the uniqueness of each individual.

With regard to the first of these requirements, it appears that many organizations confine the information about company objectives and progress toward them locked in top management's private files. For all who must work under these conditions great sympathy should be extended. Regardless, however, of how much, or how little information may filter down from above, each supervisor must formulate his own specific objectives consistent with his company's broader objectives. It is not possible to measure progress without some clear notion of what one is striving toward.

Once determined, these local or district objectives and the job analyses and descriptions based upon them should be put into writing. If written descriptions are not provided by the company, the field sales manager must, in his own interest, develop them himself after having performed a job analysis for each of the men responsible to him. In any single selling operation the majority of the jobs will be found to be quite similar. The supervisor will need, in most cases, only to describe two or three types of jobs, and in some cases even less. The process of making the analysis and preparing the description should be a revealing experience. The supervisor will almost certainly discover that his

salesmen are not doing things they should be doing, and in many cases that they are doing things he does not know about.

Without an objective analysis and description of each job, the supervisor is handicapped in his attempts to motivate his men to develop the requisite knowledge, attitudes, skills and habits.

The "Motivator" Himself

The establishment of realistic objectives and sound job descriptions provides a bracket of reference within which the supervisor must motivate his men to accomplishment. Yet such a statement of goals, however well arrived at and stated, depends for achievement upon individual people.

The most noble intentions are headed for doom unless they are implemented with understanding and deep respect for the human personality. This, to the writer, is a basic tenet of motivation. Lest this sound pious or presumptuous, it should be added that the only profundity to which the author lays claim is the profound conviction that this is an ultimate truth in dealing with people.

In order to understand others one must first understand oneself. Before one can like and respect others one must like and respect oneself. Unfortunately, understanding oneself is not as easy as it may sound and honestly liking oneself and one's motives is sometimes hard to face; but the only way one can understand others, the only way one can grow, is by diligently seeking self-understanding, however painful the process may be. Almost everyone is familiar with the biblical quotation, "Love thy neighbor as thine own self." On the surface, this seems almost deceptively simple. In his excellent text, The Passionate State of Mind, Eric Hoffer provokes interesting thought for this age-old concept.

To quote:

The remarkable thing is that we really love our neighbor as ourselves. We do unto others as we do unto ourselves. We hate others when we hate ourselves. We are tolerant toward others when we tolerate ourselves. We forgive others when we forgive ourselves. We are prone to sacrifice others when we are ready to sacrifice ourselves. It is not love of self but hatred of self which is at the root of the troubles that afflict our world. 33

33 Eric Hoffer, The Passionate State of Mind, Harper and Brothers, New York, p. 61, 1955.

This is strong language indeed, perhaps more so than the reader will accept. But knowing oneself and liking what one sees, is in the author's opinion, the beginning of knowing and managing others; indeed it may well be the beginning of wisdom.

The word wisdom was chosen above with no reservations, because it was felt that wisdom, inherent or acquired, is a paramount requirement for the patient day by day management of people.

The Individual as an Entity

To a large degree, the success achieved in motivation by the field supervisor will be measured by his ability to consider each of his men as an individual. This view is well outlined in an excellent pamphlet entitled, Motivating Salesmen: Some Personal Observations, by Robert P. Alberts, and a rather interesting, if lengthy, quotation follows:

Managing salesmen is a selling job; and I believe it would be better performed if more of us regarded it as such and approached our salesmen with the same respect we do our customers; do you treat every Presbyterian

like every other Presbyterian, every Catholic like every other Catholic, every Jew like every other Jew, every redhead like every other redhead, or every fat man like every other fat man? Obviously not. No one, to my knowledge, ever sold anything to a type; only individual people can sign orders. Similarly, no one ever motivated a group of salesmen as a single lump of humanity; people learn and are inspired only as individuals.

If I make no other point in this discussion, I shall feel rewarded if I get this message across: In training and motivating, in everything you do with your salesmen, you are dealing with individuals. Each of these people is unique, different from every other. To me this is the real wonder and glory of the universe. I have a very personal religion that holds that individuals are worthwhile; that each of us is precious; that each of us has within him a spark of the divine. I do not believe that this notion of a common divinity need make us soft or sloppily sentimental in our dealings with people; certainly Christ, personification of love, was a realist. In our infinitely smaller sphere we should at least be capable of reasonableness in the face of reality. "Well, suppose I buy that," I hear the chorus come. "What has it to do with the problem of motivating salesmen?" Quite simply, this: Whether your company's annual sales are \$2 million, \$200 million, or \$2 billion,

they are the result not of some vague, nebulous, anonymous lump called the "sales force," but of the efforts of a number of unique, wonderful, frequently strange and aggravating precious individuals. And it is the degree of success, with which these individuals achieve their individual objectives - through proper motivation - that will determine your success or failure as a field sales manager. 34

Money The Mighty Motivator

The reader may well have wondered at the lack of any mention so far of the "Mighty Motivator" money. This has not been because its importance has been underestimated, but rather because it seems so obvious.

There seems to be with most men a limit as to how far they will travel for extra compensation. Money is important, certainly, but so is pride: a man's good opinion of himself. Most men having reached a plateau of relative financial security will do for pride what they would never do for profit. Pride thrives on appropriate recognition - and this is motivation.

34 Robert P. Alberts, Motivating Salesmen: Some Personal Observations, American Management Association, New York, p. 4, 1960.

The Concept of Motivation

If this chapter has left the general impression that an understanding of motivation is complex and difficult, it has partially fulfilled its mission.

It is interesting to examine, even briefly, the opinions of a noted psychologist concerning this rather difficult concept of motivation. Dr. R. S. Peters has this to say:

For toleration will surely follow the acceptance of the thesis that the role of the Galileo of psychology must be forever unoccupied. Psychology has not soared into its Galilean period as is so often thought, through lack of bright ideas, experimental ingenuity, or methodological rigour. It has remained earth-bound in mazes and Skinner boxes because the highly general theories which, it was hoped, would emerge, are logically impossible. The fundamental mistake of theorists like Lewin and Hull was to assume that what psychology requires is a Galileo. What would be much more salutary would be a more careful scrutiny of the conceptually illuminating start made by Aristotle. 35

35 R. S. Peters, The Concept of Motivation, Rutledge and Kegan Paul, London, pp. 156-157, 1958.

Summary

The major purpose of this chapter has been to stress the importance of motivation - positive motivation. To this end three important requirements for the supervisor were suggested.

- (1) Understanding objectives
- (2) Equating each salesman's job against the objectives
- (3) Respecting the uniqueness of the individual

A large section was devoted to a discussion of the importance of self-evaluation and self-analysis of the "motivator" himself.

Conclusions

In concluding this chapter on motivation, it seems appropriate to turn once more to the work of Robert P. Alberts, *Motivating Salesmen: Some Personal Observations*, to quote:

I should like to observe that most of the highly successful people I know exist in a state of emotional imbalance. Their drive toward achievement is fueled by above-average emotional hungers. They have problems and they create problems.

They are almost invariably interesting people. Their contributions are so enormous, proportionately, that it makes good sense for us to learn to live with them - and, where possible, to help them live with themselves. In no sense, therefore, should my remarks be regarded as a plea for hiring salesmen who are "normal, perfectly adjusted" men. (even if I were to concede that there is any such creature as a "normal" or "perfectly adjusted" man - which I shall not.)

If the psychological test batteries were as effective as some psychologists and companies would have us believe, and they were able to select prototypes of this perfectly adjusted individual, you and I would be out of jobs. For I would not be writing this, and you would not be reading it, unless there was something eating at our insides - something that is driving us to find the things our companies require, win ourselves approbation in our communities, and slake our psychic thirsts.

The perfectly adjusted man, after all, would be in a state of perfectly comfortable, perfectly stable, perfectly useless equilibrium. And that doesn't move the goods. 36

Chapter IX

FLOW OF RESPONSIBILITYIntroduction

This chapter might well have been titled "Communications," "Flow of Communications," "The Responsibilities of the Supervisor in Communications" or one or another of such titles from an almost endless list. After careful and thoughtful deliberation the term "Flow of Responsibility" was selected because it seemed a much more definitive and encompassing term.

The purpose of this chapter will be to outline this responsibility, its importance and its dual, or two-fold nature.

In order to illustrate best the total flow of responsibility throughout all of the various echelons of the field structure, it may be best to turn for a moment to a brief study of the usual pattern for organization of field management.

Field Management Structure ³⁷

If standard business practice is accepted as a guide, it seems possible to distinguish four major levels of field sales management - though it must be added in haste that all companies do not have all four and some may have even more. Beginning at the top level they are:

- (1) Regional Managers
- (2) Divisional, or Branch Managers
- (3) Supervisors, or District Managers
- (4) Senior Salesmen and Salesmen

(1) Regional Managers are typically closest to the "policy-making" sales executives. From one point of view, the regional manager's prime function is to represent the home office in the field; from another equally valid point of view, his prime function is to represent the field at the home office. From any point of view it is the regional manager who actually bridges the gap between the home office and the field. Through

37 For an interesting discussion of field sales structure see: Kenneth R. Davis, Marketing Management, The Ronald Press Company, New York, 1961.

him the headquarters executives derive almost all of their knowledge of customer's needs, the acceptability of the company's products and the activities of competitors; through him local managers and the field sales force derive almost all of their knowledge of company objectives, policies and plans. Obviously, his most important responsibility is to maintain close liason with both headquarters and the field, his most important requirement to be able to think and communicate in both the terms of the home office executive and the terms of the field salesman.

(2) Divisional, or Branch Managers, are primarily responsible for the operation of basically homogeneous sales districts. In the hierarchy of sales management, they are the "doers" - the implementers - and are usually the interpreters of local market and competitive conditions. In the larger divisions, or branches, these managers frequently supervise considerable non-selling personnel and related activities as well.

(3) Supervisors, or District Managers, are those field managers who are charged with the responsibilities for the personal direction of salesmen and who

have no responsibility for maintaining local or branch offices. The sales supervisor ordinarily reports to the divisional, or branch manager, and is responsible for a team of salesmen and a group of accounts. In any several-layered management organization, supervisors represent the first level of management above the salesman. They are also (it might be added, as an aside) the reason for the existence of this text.

(4) Senior Salesmen often have certain limited managerial responsibilities similar to those of sales supervisors, but they usually represent a transitional stage between selling and supervision. The senior salesman is an embryonic manager; although primarily responsible for personal selling, he devotes a small proportion of his time to directing the selling efforts of one, two, or even three junior salesmen.

Organizational Variations

The reader may have been quick to take exception to this neat categorization, since the hierarchy structure pictured here can, of course, be grossly misleading. In field sales management, as elsewhere, titles vary widely from one firm to another.

In one large television firm, for example, those who are called "district managers" are in reality senior salesmen; the management title affords the customer a certain amount of prestige and the senior salesmen, presumably, a certain amount of self-satisfaction. ^A In contrast, the district managers of a large pharmaceutical house are an integral part of top marketing management and participate actively ^B in major policy decisions.

There are, of course, other variations as well. Among some of the largest companies field managers are specialists in one aspect of sales supervision or another; among certain of their smaller competitors, these managers have considerably more authority and responsibility.

Although job differences cannot always be attributed to industry or to company-size characteristics, there are certain general patterns that seem consistent. Among manufacturers of packaged consumer goods, for example, a number of the most successful companies are advertising - and sales-promotion-oriented. Theirs

A & B Both illustrations described above are from the author's personal observation. A. The Motorola Company. B. The Upjohn Company.

is a "Pull" strategy. They spend very large sums trying to pre-sell customers and to make capital of "impulse buying." Under these conditions, obviously, salesmen and their supervisors in the field have very special responsibilities. The managers tend to concentrate upon selling the large accounts - wholesalers, chain buying offices and major supermarkets. The salesmen, at least in part, become store merchandisers who must fight for shelf position, tie-in promotions, and point-of-purchase displays. Their efforts are aimed primarily at making the company's over-all advertising and sales promotion programs effective at the point of purchase. In this scheme of things, line sales management is secondary to product and advertising management - its duties are to see that advertising expenditures are successfully merchandised.

Among producers of "ethical" pharmaceuticals, on the other hand, personal selling and service are the key marketing ingredients. Advertising support is secondary. Theirs is a "Push" strategy which relies heavily upon the personal skills of field salesmen rather than the effectiveness of mass-media communications. Obviously, field management duties are not at all the same in such organizations as they are in companies geared to a "Pull" strategy.

A third pattern exists among companies whose products are sold from door to door. Here the problems of staffing are so great that the field sales manager's key responsibility is personnel administration; the recruiting, selection, training and supervision of salesmen.³⁸

The significance of these distinctions is manifest. To the extent that the job of field sales supervision reflects important marketing, strategy and manpower differences, it is dangerous to regard all supervisors in terms of any single "common denominator." Ways of thinking about these managers that depend upon rules of thumb, rigid principles, or fixed patterns of behavior are inadequate guides for improved selection, development and evaluation. In field sales management, managerial competence is a function of the specific situation.

Management's View of Field Supervision

Reference was made above to the differences in the responsibilities of field supervisors from one firm

38 The three industry illustrations listed above were drawn from the author's personal experience and include, (1) a large soap company (2) a manufacturer of prescription drugs and (3) door-to-door experience selling greeting cards.

to another. Such differences suggest a third way of looking at field sales organizations; namely, according to the degree of responsibility and authority that is delegated to field sales management. In essence, this degree reflects top management's philosophy with regard to local autonomy. The amount of, or lack of, independence granted local managers may be based upon such sound considerations as market, product or manpower limitations, or it may merely reflect some unreasoned but traditional executive attitudes. Whatever their origin, such manifestations of management philosophy have important repercussions in the field and profoundly affect the requirements for and attractiveness of field sales supervisory positions.

The Supervisor and Communications

Regardless of the field structure and the similarities or differences existing between the field supervisor's job among the various firms, one vital function, the two-way flow of essential information, remains common to all. So far emphasis has been placed on the flow concept downward. No company, however, can thrive long nor can management long remain informed if the flow

of information is in one direction. Without an intelligent upward flow of information from the field executive, management's "mahogany desk" would soon become a sterile area.

If reliable reports emanating from many branches or districts are gradually distilled and then filtered away, the residue of importance remains, in fractional parts, at the various levels of field management. The "mahogany desk" area of executive management receives only the sterile vapors of what remains. This gains added significance when it is noted that such reports are important guides in evaluating over-all market trends, competitive activity, product performance, the effectiveness of service and policies, and various elements of the total enterprise. In the last analysis, every activity carried on within the company is designed to help move the goods to the customer; since the divisional manager or supervisor and his salesmen are closest to the customer, they are in the unique position of being able to discover many weaknesses and needs for improvement in nearly every segment of the company.

The Opposite Side of the Coin

The opposite side of the coin, or the bottom (if you choose) of the sales structure, presents a salesman with his most perplexing and frustrating problems - created when the flow of responsibilities are inadequate.

Among the most difficult of such problems is the ability, or lack of it, to grasp and understand the over-all problems and objectives of top management. Not only is this difficult for many salesmen, but it is often only a little less difficult for his supervisor.

Top management would do well, in every case, to clearly state not only its immediate and future objectives, but also the reason, or reasons why they are important.

Each man at every level of the sales organization should be given, as precisely as possible, the reasons for each specific function he is required to perform and how it relates to the organization as a whole.

Unfortunately, in many firms the various echelons of field management tend to react as small cliques or

private clubs in their policy and decision making meetings. The desirability and even necessity of complete and honest reporting to the level of men just below them is overlooked or disregarded. Perhaps examining a specific, if hypothetical, example of such a situation may prove helpful.

Frustration at the Base of the Pyramid

In this illustration it will be assumed that the long term planning of a pharmaceutical firm (accustomed through years of practice to marketing products available only on a prescription basis) decides to market a steadily increasing number of items to be sold "over-the-counter." The long run goal or objective of management in this situation is the establishment - when sales volume of the new items warrants it - of a subsidiary firm to market only "over-the-counter" items.

This firm's representatives, however, throughout their tenure with the company, have been accustomed to selling specific items in a specific way. When suddenly charged with these alien sales techniques and responsibilities they will tend to resent such action - unless they are led to thoroughly understand management's reasons.

Carefully outlined immediate and future objectives formulated by management and explained by first line supervision will eliminate this tendency toward resentment. Indeed, in this illustration, it might well serve as a powerful motivating force since each salesman could be led to believe that he was sharing in an exciting adventure - the creation of a future junior firm. During the years ahead, each man so motivated would no doubt point with considerable pride to the firm he "helped create."

The importance to management of the supervisor's ability, as a functional responsibility, to convey exactly the views of its objectives seems crystal-clear in this illustration.

The Same Situation in a Communications Vacuum

This is in sharp contrast with the other rather obvious alternative. Men requested to perform this additional and unfamiliar function (of selling an "over-the-counter" item) and given no satisfactory explanation for the request, except perhaps the rather inane comment, "just do it, the home office wants it done," will deeply resent this action. The resentment will vary, of course, in direct proportion to the existing variance of the individuals, but it seems conservative

to say that at best the function will be performed grudgingly.

Conclusion

It is not the purpose of this paper to examine the reasons executive management so frequently seems to operate behind the theory "the greater the degree of secrecy the better," but where this situation does exist the author's heartfelt sympathy is extended to those forced to work bound by such shackles.

Even when such a disagreeable situation does exist, it may be at least partially alleviated by capable supervision and an actual dual flow of responsibility.

When existing problem situations and poor morale are witnessed, this vital information and its suspected reasons must reach top management intact. Diagnosis, in this case at the field supervisor's level, is of paramount importance, but executive management's prognosis and the situation's eventual cure will not occur without an uninterrupted, unfiltered flow of responsibility.

Summary

Chapter IX has discussed the dual, or two-fold

responsibilities of an effective flow of responsibility within the field sales organization.

Typical field management structures were examined and the basic responsibilities of the following four major levels were discussed:

- (1) Regional Managers
- (2) Divisional, or Branch Managers
- (3) Supervisors, or District Managers
- (4) Senior Salesmen and Salesmen

In addition, organizational variations were outlined and three major "function orientated" types of sales organizations examined.

The balance of this chapter was spent in a study of the importance of an adequate flow of responsibilities to both the top of the sales hierarchy and the bottom. The conclusion was intended to strengthen the expressed conviction of the dual responsibility as a vital link of the supervisor in an effective flow of responsibility.

Chapter X

SELECTION CRITERIA FOR SUPERVISORY PERSONNELIntroduction and Rationale for this Chapter

It was not within the original purpose of this paper to consider, or discuss selection criteria for field supervisors. As the study progressed, however, it seemed evident that at least a briefly drawn framework was in order, since only through the proper selection of its field supervisors will management be able to achieve the goal of effective field supervision.

A Five Step Selection Procedure

Dr. Martin Shotzberger, in his dissertation, Evaluation of Selection Criteria For Supervisory Personnel, outlines the following systematic five step process for the selection procedure.

- (1) Job Analysis
- (2) The Job Description
- (3) The Job Specification
- (4) Worker Qualifications
- (5) Evaluation ³⁹

39 Martin Luther Shotzberger, Evaluation of Selection Criteria For Supervisory Personnel, The Ohio State University, Columbus, Ohio, pp. 26-29 & 45, 1960.

The text quoted above is an exhaustive, and comprehensive study of the techniques, methods and criteria for selecting supervisory personnel in a specific manufacturing industry. Any attempt to duplicate, even in a very minor sense, a work of this nature within the confines of a single chapter would, obviously, be impossible.

The author feels that the first three steps in the selection procedure (1) Job Analysis, (2) The Job Description, and (3) The Job Specification, have been discussed, in general terms throughout the first nine chapters of this text. The balance of this chapter, therefore, will be confined to the singular examination of one factor in the selection process, (4) Worker Qualifications. (5) The fifth step, evaluation, will be briefly discussed in the conclusion of the chapter.

General Qualifications

During the past several years a considerable amount of interest has been shown by marketing executives in determining the best source of supervisory manpower. Today it seems generally agreed that selection from within, when possible, is the soundest method

of obtaining supervisory personnel. As previously mentioned, however, this will only be possible, to a satisfactory degree, when careful selection and sound training principles were applied at the level of the salesmen.

When the time comes to select a supervisor, too frequently the only qualifications considered are the years of service and success of the candidate, or candidates as salesmen. The salesmen with the longer service and superior sales record is often selected for management responsibility, despite the fact that he may lack important qualifications.

Success as an outside salesman should not be assumed to be adequate preparation for the efficient direction of others. In fact, an outstanding salesman may like traveling and direct contact with customers to such an extent that a supervisory job will be boring. Many successful salesmen prefer to remain in active selling rather than to become sales supervisors of sales executives. From the standpoint of earnings, many salesmen secure higher incomes than the sales administrators, and for this reason alone prefer to continue as salesmen. An average salesman, moreover, should not be disqualified for consideration as a supervisor.

It has been the general observation of the writer that most men selected for positions of increased responsibilities (assuming they possessed the necessary qualifications at the outset) tend to grow in ability through the pressure and stimuli of their new positions. Many sales executives finding themselves in the role of "selectors," however, apparently do not share this outlook since they tend to view the men considered eligible by the concept of "current performance only."

Five Specific Qualifications

The following five specific qualifications for the selection of supervisory personnel are not intended as a finite list, rather it is suggested as a broad framework within which each sales executive may fit his own list of minute and specific qualifications.

No doubt the reader will be quick to discern that the following list of qualifications differs (and differs widely in some respects) from any other such list he may have read. This is due neither to literary licence nor ignorance of other authors' views, but instead to the personal convictions this writer has gained through many years of field sales experience. The five qualifications are:

- (1) Personal Integrity
- (2) Loyalty
- (3) Empathy
- (4) Business Competence
- (5) "Moderate" Extroversion

At first glance the list does not appear so very much different, at least in outline, from other such lists. A more detailed examination, however, of each of the five qualifications may bring some basic differences into sharp focus.

(1) Personal Integrity

Placed at the head of the list with careful deliberation was personal integrity because lacking this vital qualification no man should be selected to lead the business destiny of others. An absolute definition, acceptable to all, of personal integrity, is difficult at best, but for the purposes of this paper it is intended to encompass the following three major factors.

- (a) Basic Honesty
- (b) Moral Soundness
- (c) Emotional Stability

The field supervisor who is not (a) basically honest cannot project a self image of (b) moral soundness to the men under his direction. A lack of moral soundness almost invariably leads to improper personal conduct and results in negative motivation. (Note: this was discussed in Chapter VII.)

The third factor of personal integrity (c) emotional stability is considered an essential characteristic of supervisory personnel since in the day-to-day job difficulties will occur, pressures arise and individual crises develop. Handling these situations requires greater emotional stability on the part of the supervisor than is found in the average salesman. The supervisor should be a sensitive individual, but one who can control and channel his emotions in such a way as to aid rather than interfere in the handling of salesmen.

(2) Loyalty

This characteristic is treated by most authors of sales management texts as a responsibility flowing one way - upward toward management and the company. This, however, is not realistic. Loyalty must flow from the field supervisor two ways, down to the men he

leads and upward toward the management to whom he is responsible.

At this point the writer wishes to state the basic tenet (which may seem unorthodox in terms of standard sales management theory) that between the two flows of loyalty, the downward flow from the supervisor to the men he leads is of primary importance.

Assuming the supervisor is a man of personal integrity - the quiet and consistent demonstration of loyalty extended to each man he leads will assure him their admiration, respect and cooperation.

This view does not, of course, negate the importance of the upward flow of loyalty from the supervisor to his firm. Without such loyalty toward his company, a supervisor cannot expect to develop loyalty in his salesmen. The loyalty of the supervisor will be manifested in the manner in which he answers the questions of his salesmen. In turn, the loyalty of salesmen will be apparent in the manner in which they answer the questions of their customers. The importance to the total enterprise seems evident.

(3) Empathy

"If you must sell John Smith what John Smith buys,
You must sell John Smith through John Smith's eyes."

Anonymous

Dr. Richard S. Hatch in an excellent and very comprehensive doctoral dissertation entitled, An Evaluation of a Forced-Choice Differential Accuracy Approach to the Measurement of Supervisory Empathy, has the following to say concerning this important characteristic:

The above quotation is typical of the common-sense "validity" which abounds in many applied fields where the concept of empathy is widely believed to have significance in the daily practical relationships between people. The "ability to place oneself in another persons shoes," as empathy is often defined, is a social skill believed to have significance at every level of the occupational hierarchy. The relationships between salesmen and their customers, managers and their subordinates, clinicians and their patients, teachers and their students, politicians and their electorates, and counselors and their counselees are but a few examples from a long list which might be provided. Empathy, or the accurate prediction of the feelings, attitudes, or opinions of another person, has been described by such processes

as social perceptiveness, clinical intuition, insight, understanding, predictive abstracting, social sensitivity, and diagnostic competence. 40

Viewed in the light of Dr. Hatch's interpretation, empathic ability is clearly a strong and vital characteristic of supervisory personnel.

In addition a genuine degree of empathic ability will tend to refine and regulate the supervisor's judgment and will aid his ability to reason and think logically. Another important by-product of empathic ability will be an increased measure of patience. Helping salesmen accept different and frequently difficult ideas calls for an unusual amount of patience.

(4) Business Competence

Earlier in this chapter it was stated that "the best salesman does not always make the best sales manager." This view is, of course, still held; however, in order to lead effectively representatives in the field, the supervisor must possess certain fundamental elements of business competence. Chief among these elements are the following:

40 Richard S. Hatch, An Evaluation of a Forced-Choice Differential Accuracy Approach to the Measurement of Supervisory Empathy, Prentice Hall, Inc., Englewood Cliffs, N. J., p. 1, 1962.

(a) Personal Selling Ability - The supervisor who is a truly poor salesman would find field leadership difficult, if not actually frightening.

(b) Personnel and Organizational Knowledge - The supervisor must be able, within certain limits, to appraise the abilities of his salesmen so that he will not expect too little or too much, but will know when a salesman is producing at his maximum effectiveness. In addition, he must know how to create a desire within men to do their best. The supervisor, in order to direct men successfully, must know how and be willing to delegate responsibility and to reconcile the viewpoint of his salesmen and the viewpoint of the top executives.

An awareness of the organization factors which provide for willing and effective cooperation is essential. If rules and regulations are to be interpreted to employees, an appreciation and the need for cooperation with staff executives and other line executives as well as the total organization structure is necessary.

(c) Verbal, Writing and Reading Ability - Much of a supervisor's work involves the communication of ideas. He talks with his men, prepares reports, and

must read and understand written policies, orders and instructions. For these reasons, verbal and reading ability are of obvious importance, although this is not meant to imply that high ability in this factor alone is sufficient to insure supervisory competence.

(d) Learning Ability - Learning ability is a basic requirement for the supervisor. This ability must, of course, go beyond that required of the sales representative. Only those men who possess a satisfactory degree of learning ability will be able to master the following factor, teaching ability.

(e) Teaching Ability - Teaching ability should rank high among the requirements for a supervisor. This quality embodies many of those discussed previously, but should be given special consideration. To teach salesmen, the supervisor must be understanding, but not too sympathetic with salesmen who do not overcome weaknesses. This is a supervisory quality that many successful salesmen will lack. Not everyone who is capable of excellent performance is equally capable of teaching others how to perform.

(5) "Moderate" Extroversion

Every student of marketing is familiar with the terms "People-Minded" or "People-Oriented." These terms appear most frequently in regard to desirable traits in the selection of salesmen. Most writers in the field of marketing list these factors as of equal importance as selection qualifications for supervisory personnel.

Mild issue will be taken at this point with these writers (mild issue only) because it is not suggested they are entirely wrong, but rather that their emphasis in this direction is too strongly placed. It is readily conceded that extroversion is an asset to a prospective salesman, and it is also admitted that this is true of the candidate for sales supervision - but to a much lesser degree.

Supporting evidence for this postulation may be drawn from the following phrase - "Selling is the world's most lonesome job." This, or a similar phrase, is to be found in almost any text on sales selected at random. Selling is a lonesome job. Not only is this conceded, but it has been previously discussed in this paper. If selling is a lonesome job then the task of supervising the man who does the selling

is even more so.

Restricted to his own counsel, subject to long and extensive travel and removed from his family for extended periods of time the "moderate extrovert" may well prove better adaptable to his environment than the gregarious "true extrovert" usually sought as a salesman.

Conclusions

It must be self-evident that few, if indeed any, men will ever possess all of the worker qualifications for supervisory personnel outlined in this chapter. Nevertheless, it does seem safe to generalize that substantial progress toward the goal of improved supervision will be achieved by any sales organization willing to devote the time and effort required to compile specific worker qualifications, and then evaluate these qualifications against the jobs specifications involved.

Unfortunately in sales organizations, as apparently in the manufacturing industries, this ideal situation has not always been the rule.

Concerning a specific manufacturing industry, Dr. Shotzberger very aptly, and with typical wry humor, states a situation thus:

The supervisory job is a big one for which, by and large, little men have been chosen and there has been no significant attempt to bring the men up to size. The result of this lack of action can only mean a degrading of the supervisory job itself. ⁴¹

Summary

Chapter ten began with a suggested five step selection procedure as a broad outline, and immediately suggested that step (4) four, worker qualifications, would constitute the bulk of the chapter's discussion.

The following five specific qualifications were submitted as criteria for the selection of field sales supervisors.

- (1) Personal Integrity
- (2) Loyalty
- (3) Empathy
- (4) Business Competence
- (5) "Moderate" Extroversion

Each of the five specific qualifications submitted above was discussed in some detail. It was further suggested that these five major criteria for the selection of field supervisors were "unique," both in interpretation and order of importance.

Chapter XI

SUMMARY AND RECOMMENDATIONSIntroduction

This thesis has been a study of one of the most important single functions of sales management, field supervision.

At the outset of this discussion the following two basic tenets were brought forth.

(1) A marked lack of interest, and resulting neglect, from both students of marketing and sales executives alike has occurred in the area of field sales supervision.

(2) The premise was set forth that effective field supervision represents one of the most important single links in the total distribution function of organizations with a field sales force; furthermore, it was noted that this area represents one of the most effective techniques for increasing total sales productivity of a given sales force.

Background of Supervisory Neglect

The historical background for the neglect of field supervision was examined and among the findings

were the following:

(1) Sales executives have often felt supervision was not required.

(2) Geographic difficulties, imposed by widely scattered territories, have imposed restrictions on the ease of supervision.

(3) Sales management has often viewed field supervision as an abstract function whose accomplishments were difficult to equate in "dollars and cents."

(4) The "compensation attitude" which, simply stated, suggests that salesmen paid well and fairly will not require supervision.

(5) A final reason for neglect of the function of field supervision is the belief by some executives that salesmen themselves do not want supervision.

Do Salesmen Want Supervision?

A detailed study was undertaken at this point in order to determine the attitudes and desires of the salesmen themselves concerning the desirability of supervision.

Among the findings, from available literature, were three field questionnaires conducted by Dr. Charles Lapp. These three field studies established a consistent and definitive pattern in their replies - the stated conclusion - a large majority of the salesmen contacted felt a specific need for adequate field supervision.

A Six Point Program of Specific Techniques

With the establishment of both the need and desire for an adequate program of field supervision, a six point program of specific techniques was submitted to aid management in accomplishing its objective; an effective program of supervision. The six specific techniques are:

- (1) Selection
- (2) Continued Training
- (3) Field Management
- (4) Morale
- (5) Motivation
- (6) Flow of Responsibility

Selection of Field Personnel

The importance of the proper selection of sales personnel was discussed with especial emphasis being placed on the future effects of the total enterprise, i.e. future sales executive development is determined by the upper limits of ability possessed by men hired today.

Continued Training

An evaluation of the need for continued sales training was examined at this point and the basic reasons for its importance discussed.

Stress was placed on individual rather than group, or mass training technique and considerable importance attached to field on-the-job type training.

A specific ten point program for field training was suggested; the ten principal points are listed below in outline form.

- (1) Teaching daily work planning
- (2) Teaching the salesman to prepare his equipment for the day's work
- (3) Checking the salesman's briefcase
- (4) Ask, or suggest; never tell what to do
- (5) Never dominate

- (6) Never allow yourself to be introduced as the salesman's superior
- (7) Keep the trainee's interest in learning alive
- (8) Be patient
- (9) Be firm
- (10) Be thorough

Using the ten point guide above, it was strongly advised that the field supervisor should constantly build on the strengths of each salesman, in contrast to making capital of his weaknesses.

Field Management

A rather detailed study was made of the third specific technique of field supervision, field management.

The study was divided into two general areas, planning and control.

Planning was defined and the specific role of the field supervisor in this area outlined. A specific five point program detailing the role of the supervisor was suggested.

The final phase of field management, control, was defined and an analysis made of the three evaluation procedures involved in its completion.

Motivation

Motivation, for the purposes of this study, was divided into positive and negative phases; however, it has been the purpose of the study to explore only its positive aspects. In this connection considerable attention was devoted to the importance of the "Motivator" knowing, and liking himself.

Morale

The primary aspects of the views this paper presented on the subject of morale was in its unique insistence on morale being considered a group, not an individual function within the sales force.

The five basic drives of man were outlined, and from them three dominant motives for supervisory consideration formulated.

Flow of Responsibility

The dual or two-fold nature of the flow of responsibility was discussed at this juncture, and a typical field management structure examined. In addition the importance, to both the top and bottom of the sales organization, of an effective flow of responsibility was studied.

Selection Criteria for Supervisory Personnel

This area of the study has dealt with a specific five point list of qualifications for the selection of supervisory personnel. The five specific points studied are as follows:

- (1) Personal Integrity
- (2) Loyalty
- (3) Empathy
- (4) Business Competence
- (5) "Moderate" Extroversion

Summary and Recommendations

Throughout this study a sincere effort has been made to stress the importance of a positive program of field supervision.

The whole area of supervising outside salesmen is a fertile field for study. The sales executive that will experiment in this area, and will study in a truly scientific manner the cost in both time and money of utilizing specific methods and tools of supervision in relation to net profit realized, will gain a distinct competitive advantage resulting from the increased effectiveness in the utilization of manpower.

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