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Enhancing sales through a holistic approach

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Abstract:

Sales research is increasingly recognizing the blending of salesperson responsibilities, the growing number of interactions involved in sales processes and activities, and the nonlinear nature of value (co)creation. This has resulted in a shift towards more holistic and systemic views to explain selling and sales related phenomena. We adopt such a view to examine broader social structures and argue that recognizing their overlapping and nested nature is important to understanding sales processes. To aid the investigation of social structure and theorizing more generally, the practice of examining levels of aggregation and theoretical abstraction is introduced. This practice can also in the framing of articles and identification of their contributions to the sales and broader literature.

Keywords:

Systemic, holistic, social structure, levels of aggregation, levels of theoretical abstraction

1. Introduction:

As the premier journal for sales and sales management research, the *Journal of Personal Selling & Sales Management* (JPSSM) has been instrumental in improving the methodological, statistical, and theoretical rigor of sales research over the last several decades. Recent initiatives such as the previous special issue focused on “Measurement in Sales Research,” the special section on sales research methodology announced in 2012 (Lee and Ahearne Citation2012), and special section on uncovering and reporting boundary conditions announced in 2019 offer confidence that methodological, statistical, and theoretical rigor will continue to improve. While the future of sales research shows much promise, there is a growing consensus within the field that this future can be made more promising if stronger connections to other areas of marketing and business are forged.

Recent research on sales has tended to rely on the application of theory developed elsewhere (i.e., management, psychology, broader marketing) to frame research questions, develop hypotheses, substantiate models, and explain findings. Often there has been little intent to significantly contribute to such theory or to develop “homegrown” theory. While this tendency is not unique to sales scholarship, it has, arguably, stifled theoretical novelty and richness. And since it is theoretical contributions that tend to drive impact (i.e., new research ideas, innovation in practice and teaching) and connect fields, the impact of sales research within marketing and on the broader business literature has, arguably, remained artificially limited. The aim of increasing this impact is ultimately what motivated this special issue’s focus on “Systemic and Holistic Perspectives on Sales Theory.”

The topical focus of this special issue is consistent with recent work that emphasizes the potential of more holistic and systemic views to explain selling and sales related phenomenon. Such work, for example, increasingly emphasizes the potential of recognizing (1) that sales processes are non-linear (Dixon and Tanner Citation2012; Moncrief and Marshall Citation2005), (2) the many actors inside and outside the selling firm that participate in selling and sales processes (Bolander et al. Citation2015; Plouffe et al. Citation2016), and (3) the expansion and blending of salesperson responsibilities and activities with those of other roles (Hughes, Le Bon, and Malshe Citation2012; Rapp and Baker Citation2017). This topical focus on holistic and systemic thinking is also consistent with a broader transition occurring within and outside of marketing that increasingly recognizes outcomes and phenomenon as being cocreated (Prahalad and Ramaswamy Citation2004; Wieland, Hartmann, and Vargo Citation2017) in a non-linear

(Lemon and Verhoef Citation2016; Vargo and Lusch Citation2017) networked (Hakansson and Snehota Citation1995; Vargo and Lusch Citation2008) and systemic fashion (Edvardsson et al. Citation2014; Vargo and Lusch Citation2016).

However, in the sales literature, this transition to holistic and systemic views is still at an early stage. Given that much of the sales literature views interactions between buyers and sellers or managers and sellers as the main unit of analysis, a micro-theoretical focus (i.e., focus on interactions of individuals and small groups) has made a lot of sense. In fact, some may argue that selling related activities are highly specialized and therefore limited to micro theorizing. Yet, as stated above, it is clear that many sales scholars are committed to developing more comprehensive sales and sales management theory and are aiming to overcome the micro theoretical focus that is common in the field. In the remainder of this article, we contribute to such efforts by pointing to the importance of social structures and their overlapping and nested nature in improving understanding of thinking and behavior in the sales context. Specifically, we argue that using different levels of aggregation and theoretical abstraction has the potential to improve theorizing and introducing new research opportunities.

2. Theorizing the context of sales practices:

Selling can be conceptualized as ongoing relational and alignment processes regarding or affecting what is being reciprocally exchanged and the norms and representations that guide exchange practices (Hartmann, Wieland, and Vargo Citation2018). Hartmann, Wieland, and Vargo (Citation2018), drawing from Baldwin (Citation2007), point to the potential of these relational and alignment processes to lead to thin *crossing points*—locations at which service can be efficiently exchanged for service. We use the term *service* to refer to the application of knowledge and skills for the benefit of another, and recognize that such service can be exchanged directly as is the case with services or indirectly as is the case with goods (Vargo and Lusch Citation2004). Foundational to a systemic view of these alignment processes is the tension between the two classical figures of *homo economicus* (i.e., the perfectly rational economic actor of classical economics) and *homo sociologicus* (i.e., an actor paralyzed by social constraints) (Reckwitz Citation2002).

Many economists and sociologists have addressed this tension and have made great progress in resolving it. Spencer (Citation1897) and Durkheim (Citation1912/2008), for example, addressed the interplay of agency and structure. In their work on social order, Spencer

emphasized the role of self-interested actors and their conscious choice, while Durkheim emphasized the role of normative structures in shaping the practices of actors. Later work adopted more balanced approaches in which agency and structure were described as “independent though intertwined phenomena” (Hinings et al. Citation2008, 476). Giddens (Citation1984), for example, argues that the connection between agency and structure is a relational duality, rather than a dichotomous dualism. He describes social systems as reproduced social practices and explicates that structural properties make it possible for discernibly similar social practices to exist across varying spans of time and space. That is, structure is both the outcome of and context for human action.

Sales scholars have long implicitly recognized that social structures shape the practices of and relationships among actors (i.e., salespeople, sales managers, buyers). The literature, for example, points to rules, norms, beliefs and other coordinating heuristics associated with industries, firms, work conditions, environment conditions, and social networks that shape the activities of salespeople, sales managers, and buyers (Flaherty et al. Citation2012; Jaramillo et al. Citation2006). The literature also recognizes that structures and change to structures are shaped by the actions of selling and buying actors (e.g., offering novel value propositions, establishing and communicating work environment norms and roles, creating social networks) (Marshall et al. Citation2012; Plouffe Citation2018). Moreover, particular combinations of social structures and relationships entailing a context have long been used as justification by sales scholars for focusing their research on certain sub-contexts, such as B2B, B2C, or geographical regions.

However, to date, social structures have received limited explicit attention in the sales literature. This is unfortunate because examinations of social structures in other contexts, such as in the related phenomenon of value cocreation (e.g., Vargo and Lusch Citation2016) and market shaping (e.g., Nenonen, Storbacka, and Windahl Citation2019) have demonstrated that such a focus can introduce rich insights that more reductionary approaches often fail to capture. Contributing to the ability of such approaches to offer rich insights is the recognition that many aspects of social structure are inherently overlapping and nested. Bourdieu (Citation1977), for example, appropriated the concept of fields (i.e., settings in which agents and their social positions are located) from Lewin (Citation1939) to argue that the social structure that guides practices comes from a wide range of nested and overlapping domains.

Consider, for example, selling that takes place in the context of an organizational buyer and salesperson; such selling is often also simultaneously taking place in a context involving two B2B firms. These B2B firms each potentially employ many actors who coordinate with other actors in their respective firm, may coordinate with actors (e.g., engineers, financial personnel, technical representatives) employed by the other firm, and/or actors employed by neither (e.g., industry experts, existing customers, non-users). Such selling is also, of course, taking place within an industry or industries, with each industry often characterized by unique circumstances (e.g., consolidation, growth rates) and norms (e.g., code of conduct). Zooming out to an even higher level accentuates that selling takes place in a society or societies with unique contexts (e.g., inflation rates, governments and political environments, customs, laws and regulations).

That is, recognizing the overlapping and nested nature of social structure is important since, as Sewell (Citation1992, 16) points out, social change can only be understood by adopting a “multiple, contingent, and fractured conception of society—and for structure” in which actors can draw from structure across a wide range of contexts and circumstances. To aid with such investigation across nested and overlapping social structures, work examining practices in social systems can benefit from oscillating foci among alternative *levels of aggregation*: such as those associated with dyadic transactions, industries and markets, and economies and societies (Chandler and Vargo Citation2011). It is important to clarify that these levels are arbitrary and analytical – that is, they are alternative perspectives, rather than ontologically distinct; one could presumably use any number of levels. Divisions between the levels tend to be set by the researcher, and no level (e.g., buyer-seller dyad) exists or operates independently of another level (e.g., society) in real-life.

3. Systemic perspective:

Systemic perspective highlights that the study of context benefits from adopting various levels of aggregation and various levels of theoretical abstraction. Sales research, largely due to the importance of salespersons to firm financial performance as well as the relative ease of accessing salespersons for data collection, has tended to focus on salesperson level variables and emphasized dyadic (e.g., salesperson-firm, salesperson-sales manager, salesperson-buyer) micro-level, and very managerially oriented perspectives. However, increasing market complexity has contributed to the growing recognition of the broad actors involved in selling and value creation, as well as an expansion in the number of actors directly interacting with

salespersons, other selling firm actors, and buying firm actors. As stated, research has increasingly recognized (1) that sales processes are non-linear (Dixon and Tanner Citation2012; Moncrief and Marshall Citation2005), (2) the many actors inside and outside the selling firm that participate in selling and sales processes (Bolander et al. Citation2015; Plouffe et al. Citation2016), and (3) the expansion and blending of salesperson responsibilities and activities with those of other roles (Hughes, Le Bon, and Malshe Citation2012; Rapp and Baker Citation2017). Such growing recognition has arguably highlighted the complexity of context, and thus the need to “zoom in and zoom out in order to understand phenomena at any level (aggregation) of interest” (Vargo and Lusch Citation2017, 50). That is, such complexity has helped accentuate the realization that in order to better understand an activity (e.g., salespersons sales performance, ethical behavior) at one level, one should also view it from other levels (e.g., salesperson’s sales firm, ethical climate), (Vargo and Lusch Citation2017).

Moreover, misalignments between social structures can create meaningful frictions and ruptures which provide the catalysts for changes in practices (Scott Citation2013; Seo and Creed Citation2002). Such changes in practices can better be understood by looking at, and theorizing about, interactions among dyads of actors, small groups, market and industry participants, as well as societal developments. That is, unpacking the definition of context shows that context can be viewed as entailing everything from small (e.g., a buyer-seller or salesperson-sales manager dyad) to large (e.g., industries, markets, or societies) sets of actors and the reciprocal links between such actors. As Chandler and Vargo (Citation2011) indicate, “these actors, links, and contexts are complex because links between [...] two actors can affect other actors or links throughout the context and vice versa” (41). A satisfied customer may, for example, share a post on social media regarding their experience with a particular salesperson. The context of this post, can only be understood by zooming out to the rules and norms of the platform where the post was published (e.g., Twitter vs. LinkedIn), by looking at the use and impact of social media within the relevant market or industry, and by looking at societal rules and norms about appropriate language, all of which are dynamically changing over time.

A systemic view on selling not only highlights the benefit of oscillating foci between different levels of aggregation, but also the benefit of focusing on developing *midrange theories* that connect to and inform general theories. Midrange theories fall between micro theories and general theory; whereas micro theory focuses on individuals and small groups as well as their interactions, general theory tries to explain a broad subject, such as the formation

of markets. Midrange theory aims to explain “a subset of phenomena relevant to a particular context” (Brodie, Saren, and Pels Citation2011, 80), and as Hunt (Citation1983) discusses, can be distinguished from micro theories and general theory “on the basis of scope and integration (Hunt Citation1983)” (Brodie, Saren, and Pels Citation2011). As broad questions such as whether technology and increasing access to information has shifted power to procuring firms and reduced the importance of salespeople exemplify, sales scholars are undoubtedly not shying away from midrange theoretical inquiries. Even more broadly, sales focused academicians are beginning to point to the roles of selling in more general topics such as market shaping and value cocreation (Hartmann, Wieland, and Vargo Citation2018). We would argue that it is hard to envision the development of theories of markets or economic exchange without addressing the role of selling.

Furthermore, a view in which selling is conceptualized as the ongoing alignment processes of what is being reciprocally exchanged and the norms and representations that guide exchange practices highlights that broad sets of actors engage in selling processes, regardless of the roles that characterize them (e.g., firm, customer, stakeholder, politician). This perspective of selling indicates that selling is not limited to business settings but can be found in any context in which value is cocreated. Stated alternatively, sales research should not only be informed by disciplines such as sociology, psychology and management, but also inform them. It is the aim of this special issue to encourage more of the sales community to take up this exciting and rewarding challenge. A short inquiry sent to and responded to by the corresponding author for sales articles published from 2015 to 2019 that received awards from the American Marketing Association as of late 2020 indicate their articles have aimed at either higher levels of theoretical abstraction, levels of aggregation, or both (see Figure 1). This shows that such inquiries are not only important, but they are also recognized in moving the field forward.

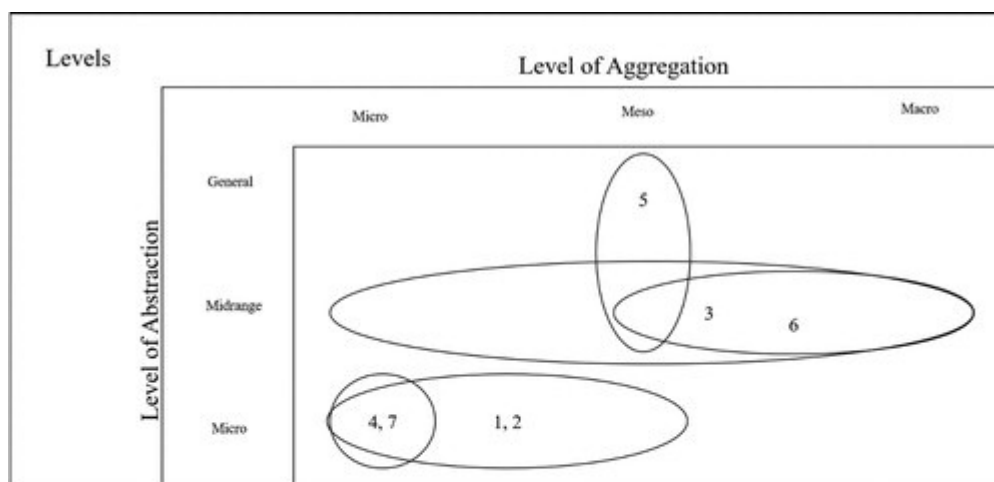


Figure. 1: Levels of abstraction and aggregation for recent award winning articles.

4. Discussion:

As stated, research can contribute to the broadening and building of theory in sales by adopting various levels of aggregation and abstraction or zooming in and out from such levels. Various levels of aggregation and abstraction can be applied to theories (e.g., micro to midrange and vice-versa, midrange to general and vice-versa), phenomenon (e.g., discrete to aggregate outcomes, or interactions to relationships), contexts (e.g., relationships between people nested in firms which are nested in industries which are nested in countries), and so on. Below, we briefly discuss how the articles in this special issue are contributing to the broadening and building of theory in sales.

The article “A holistic perspective of sales research: areas of consideration to develop more comprehensive conceptual and empirical frameworks” argues that increasing emphasis on more holistic and systemic views to explain selling and sales related phenomenon is coinciding with a trend toward more comprehensive frameworks. In this article, the authors provide a review of issues and nuances that should be considered to make conceptual, empirical, and theoretical models more comprehensive and relevant to sales practice. Specifically, the authors address data sample concerns, measurement problems, boundary conditions, temporal aspects, multilevel perspectives, and the actors/agents involved in selling. As such, this article makes important contributions with respect to how researchers can build and capture various levels of aggregation and abstraction in their conceptual, empirical, and theoretical models.

The article “An integrative framework of sales ecosystem well-being” aims to show how the ecosystemic perspectives that have recently gained attention in the marketing and service literatures can aid in explicating what actors are involved in selling and the resources and practices that shape the effectiveness of exchanges. This conceptual article contributes to a more holistic and systemic view on selling in two ways. First, it introduces a midrange theoretical framework that links sales processes to recent metatheoretical developments in work on ecosystems and systems’ well-being. Second, the article points to the importance of various levels of aggregation, namely the micro, meso, macro, and meta-level for understanding the structure, processes, and attributes of sales ecosystems. By drawing on work from diverse fields, this article offers important “conceptual linkages between ecosystem actors, resources, institutions, and practices” (this issue, 234).

The article “Effectual selling in service ecosystems” advances a midrange theoretical perspective by drawing upon both effectuation theory and service dominant logic to introduce the notion of effectual selling to the sales literature. This conceptual article, often emphasizing the micro and meso level of aggregation, makes important contributions by conceptualizing means by which salespeople manage uncertainty and value co-creation within ecosystems. A series of propositions pertaining to the antecedents and outcomes of effectual selling as well as boundary conditions offer numerous opportunities to advance empirical research.

The article “Toward a new perspective on salesperson success and motivation: a trifocal framework” addresses the question of how “salespeople define success within the context of their relationships with key stakeholders” (this issue, 268) and how “these definitions of success impact the ways in which salespeople go about pursuing such success” (this issue, 268). Using a qualitative research methodology, the article presents a midrange, integrative conceptual framework that captures the growing complexity of sales by adopting a holistic service ecosystem perspective. Based on this perspective, the article proposes that the work of sales people is framed through three lenses: the advisor, the entrepreneur and the personalizer and, based on these lenses, advises selling firms to adopt individualized salesforce management approaches tailored to salespeople. Overall, the presented framework aims to provide an integrative conceptual framework emphasizing a stakeholder-oriented perspective on salesperson success and motivation that acknowledges the growing real-world complexity of sales.

The article “Evaluation of salespeople by the purchasing function: implications for the evolving role of salespeople” is based on the premise that the outcomes of selling interactions are shaped by the perceptions, behaviors, and relationships of many actors. A qualitative research methodology is used to examine perceptions of salespeople and their behavior viewed through the eyes of purchasers. The study, which develops midrange theory and adopts a micro to meso level of abstraction, introduces novel insights regarding salesperson strategies and behaviors and how these strategies and behaviors should vary across type of industry, purchase, and offering. As such, these authors make a strong case that to understand the outcomes brought about by salespeople and the sales function, the perspective of purchasers and the purchasing function should receive more attention in sales research and practice.

5. Implications for future research:

The articles in this special issue show that various levels of aggregation and abstraction, or zooming in and out from such levels, can be used to identify and offer richer insights on numerous research opportunities. Below, we introduce some additional areas that could aid more holistic and systemic views on selling. One opportunity is to examine the nuances regarding discrete and aggregate outcomes, such as sales call outcomes and sales performance. Since aggregated outcomes are, by definition, summations of discrete outcomes, there may be a tendency to presume that effects and effect sizes generalize from one to the other. However, effects and effect sizes may vary. Consider, for example, salesperson's unethical behavior directed toward customers. Unethical behavior such as misrepresenting an offering during a sales call so that it appears more attractive to a buyer may be positively associated with the salesperson making a sale and, perhaps, their short-term sales performance. However, the relationship and reputational damages that occur as a result of a buyer realizing post-purchase that they were misled may negatively impact long-term performance due to negative word-of-mouth and churn for both the sales person and the selling firm.

Related to the above, there is an opportunity to examine the contribution of repeated events to a more critical event, such as interactions to outcomes. Such research could, for example, examine the contribution of repeated salesperson interactions to a buyer's decision to purchase or salesperson's interactions with their colleagues to their decision to churn. Investigations into how momentum carries across interactions to contribute to an outcome, as well as how swift changes to momentum trajectories impact outcomes offers the potential to make strong theoretical and managerial contributions. Furthermore, there is opportunity to examine the impact of action on an outcome while examining the impact of other actions and the ordering of such actions. Consider, for example, salesperson attempts to influence behaviors that occur throughout an interaction.

There is also potential to make valuable theoretical and managerial contributions by examining how thinking, behavior, and attitudes diffuse within and across selling and buying firms as well as others. Such research, for example, might examine how perceptions regarding a new solution diffuse throughout the selling firm and/or buying firm, and ultimately entire industries. That is, sales researchers should be encouraged to make contributions to midrange theories (e.g., the formation of new business models) and general theory (e.g., market shaping, value cocreation) since their expertise can undoubtedly inform

these discussions. Similarly, sales researchers need to continue to investigate how societal trends, such as increasing virtual interactions and digital technologies, diffuse into the sales profession and alter the importance of various skills, procedures, and abilities.

Levels of analysis and aggregation can also be helpful to identifying and understanding boundary conditions. As former JPSSM editor Doug Hughes noted when introducing the recurring special section called “The Boundary,” multiple studies are often needed in order to represent reality and revealing boundary conditions can enrich understanding of theory as well as conflicting results. By more richly and broadly accounting for various factors (i.e., salesperson, salesperson-buyer relationship, firm, industry, country, time) and their interplay, greater understanding of when and how relationships emerge can occur.

The above discussion calls attention to the importance of methodological and analytical approaches that account for repeated observations, nesting of observations within higher levels (i.e., individuals, managers, firms, and industries), networks and the diffusion of resources, attitudes, and behaviors across networks. It also points to the importance of methodological and analytical approaches that mitigate collinearity and the problems stemming from it, as well as analytical approaches that consider non-linear effects, regions of significance, and reciprocal effects. Finally, a systemic perspective of selling also points to the potential of qualitative research methodologies since some of such methodologies are well suited to dive deeply into systemic phenomenon.

6. Conclusion:

Sales scholars can increase the impact of their work by strengthening its connection to various fields. The shift to more holistic and systemic views to explain selling and sales related phenomenon affords authors great opportunity to do so. To assist authors, we highlight the potential afforded by examining the richness of social structure, oscillating perspective across levels of aggregation and theoretical abstraction, and numerous research opportunities. We conclude by expressing our sincere gratitude to the many authors and reviewers who co-created the special issue during the COVID-19 crisis. These papers not only make important contributions to explaining selling and sales related phenomenon by taking on holistic and systemic views but hopefully also inspire other sales scholars to follow this direction.

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