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INNOVATIVE SALES PLANNING AND MANAGEMENT: A FRAMEWORK PROPOSITION

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Abstract

Sales is a broad and well explored field of research. However, conceptual frameworks for sales planning and management emphasize just one aspect or another and may lack managerial orientation towards an organized group of actions for sales managers. Besides, the industrial sector may ask for new considerations and a deep exploration on aspects that are briefly discussed in general frameworks. This research aims at proposing a framework for industrial sales planning and management and integrates recent sales research advances. The sales organizations of three firms were closely followed and documented during two years and the critical aspects on sales faced by them were contrasted to the existing sales literature and classical sales management frameworks. A sequence of actions is proposed linked to the theoretical foundations used in the work and to the critical sales aspects showed by the firms.

Key words: sales planning, sales strategy, sales management.

1. Introduction

Sales is a broad and well explored field of research. Sales literature could be grouped into five main topics. First, *introductory themes*. These are the salesman tasks and taxonomy (Churchill et al., 2000; Futrell, 2003 among others), the new role of the salesman (Ingram et al., 2002; Honeycutt, 2002; Zeyl, 2002; Dawes, 2001; Cravens, 1995 among others), buying behavior (Engels et al., 2000; Sheth et al., 2001; Robinson et al., 1967 among others), and the sales process (Dubinsky, 1980; Dwyer et al., 2000; Weitz et al., 2004; Kotler, 2000; Etzel, 2001 among others).

The second and maybe the one which has been more explored by researchers is *sales organization*. It includes the choice between employed salespersons and independent representatives (Anderson, Weitz, 1986; Anderson, 1985; Coughlan, 2001; Besanko, 2000 among others), the level of specialization of the sales force (Rangaswamy et al. 1990, Shapiro 1995, among others), setting the size of the sales force (Zoltners et al., 2001; Lodish, 1971; Albers, 2000; Skiera; Albers, 2000 among others), territory alignment (Albers, 2000; Zoltners et al., 2001; Sinha and Zoltners, 2001 among others), the alignment between marketing strategy and sales strategy (Olson et al., 2001; Churchill et al., 2000; Ingram et al., 2002 among others), the establishment of the organizational structure and level of centralization (Churchill et al., 2000; Ingran e LaForge, 1992; Dalrymple and Cron, 1992 among others), the sales manager role (Ingram et al., 2002; Ryans and Weingberg, 1981), account management and the determination of sales quotas (Georges, 2002; Winer, 1973 among others).

The third topic is *human resources in sales*. These are policies and actions related to acquiring and maintaining a well prepared and motivated sales team, which are recruiting and selection procedures, training, motivation, and compensation (Albers, 2000; Atkinsons and Higgins, 1988; Ingram e Bellenger, 1982 among others). The fourth is related to *sales control and audit* (Ryans and Weinberg, 1981; Chonko et al., 1992 among others). Finally, the fifth discusses *sales automation and information technology* (Morgan, 2001; Jones et al., 2002; Albers, 2000 among others).

Although the sales literature is vast and complete and advances have been made, the frameworks for the sales planning and management focus just on one aspect or other and also may lack mana-

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gerial orientation towards an organized framework for sales managers. A framework is supposed to organize in a logical sequence the actions which must be undertaken by sales managers. It also shows the relationships among the decisions (Ryans and Weinberg, 1981). Some available models are from Churchill et al. (2000), Ingram and LaForge (1992), Dalrymple and Cron (1995), Ryans and Weinberg (1981) and Chonko et al. (1992).

Besides, a particular industry may call attention to decisions which are not taken into consideration or which are briefly treated by general frameworks. The agricultural input industry (ag-input industry) in Brazil is taken as a case to show how important aspects might be included or highlighted in those frameworks.

The reason for choosing the ag-input industry in Brazil as the scenario to develop this framework is first the high importance personal selling has on the attainment of firms' objectives. It is an industrial sector by definition, personal selling is very important as compared to other communication methods (Shapiro et al., 1995).

Secondly, by the increasing changes occurring in its environment. These are the increasing demand for services and a better qualified salesman (Rossi et al., 2003), the increasing concentration among growers, leading to increased buying power and emergence of key accounts (Neves, 1999), the existence of sales and marketing channels conflicts (Castro et al., 2003), the internationalization of the sector, once Brazil is an important buyer of ag-input, all global players went to the country (Zylbersztajn, Neves, 2000), and the coexistence of several different formats of salespeople, as employed salespeople, distributors, agents, independent representatives and independent consultants (Neves et al., 2001). Hence, the industry is a fertile ground for updating and adapting these general frameworks.

2. Objectives

The central objective of this research is to propose a sequence of steps for sales planning and management that consolidates the existing sales literature and covers the critical aspects of the ag-input industry in Brazil. Specific objectives are:

- ◆ to compare the available and most important sales planning frameworks in the literature;
- ◆ to raise the most critical sales planning issues in the context of the firms analysed;
- ◆ to identify the gaps between the critical aspects for sales management in the considered industry and actual sales planning frameworks;
- ◆ to consolidate the fundamental decisions of sales planning and management in a complete sequence.

3. Method

The objectives mentioned above are reached by comparing the existing frameworks for sales planning and management to the critical aspects regarding sales management. The existing frameworks are selected according to their importance identified by the frequency of citation by sales researchers or they simply are from traditional sales authors. The chosen ones are Churchill et al. (2000), Ingram and LaForge (1992), Dalrymple and Cron (1995), Ryans and Weinberg (1981) and Chonko et al. (1992).

To identify critical aspects in firms, the sales organizations of three firms were closely followed for the development of multiple case-studies. The choice for case studies as research strategy is related to the nature of the research problem. Once the main objective is to identify, in the current and real environment, the critical aspects for sales planning and management, there are many different variables and the operationalization of them is neither possible nor is their control and dissociation from environmental influences. They all make part of the research problem.

As Bonoma (1985) suggests (discussing case research in marketing), problems of this nature require a trade-off between data integrity and currency, in order to make research feasible. In this

paper data integrity is definitely reduced in order to increase data currency, and case study is one of the methods that most fits this condition, while still being considered science, differently from stories, myths and legends. Other alternative methods (with high currency), would be field studies or field experiments, but they would already require restrictions that would make generalization rather difficult. Respondents (marketing directors, salespeople and sales managers) would not verbalize the underlying causes of their behavior reliably.

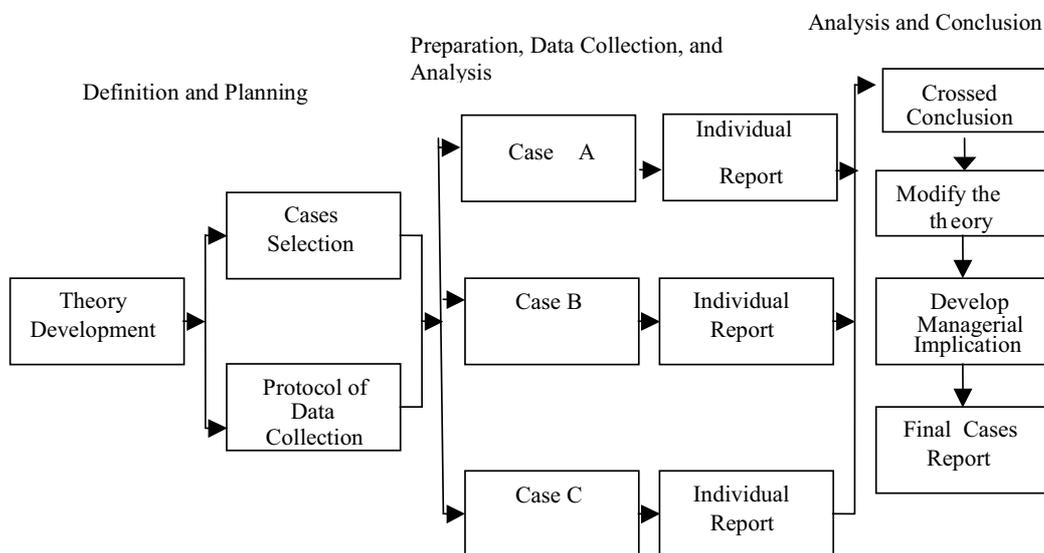
Also “when the main objective is theory building rather than verification or extension, the tasks of description, classification and comparison become relevant” (Bonoma, 1985). Still as mentioned by Eisenhardt (1989) “building theory from case study research is most appropriate at the early stages of research on a topic or to provide freshness in perspective to an already researched topic”. Therefore, regarding research problem and its objectives, and the complexity and breadth of the phenomenon observed and alternative methods, case study is the most appropriate choice.

Three different firms were chosen, each operating in different market segments. Two were multi-nationals and one was a family owned business. All of them had sales as a primary marketing function and were experiencing several challenges in their sales forces.

The protocol for data collection contained the main purpose of describing the sales force management in these firms and raised the critical aspects for their sales management. It was composed of open questionnaires for the marketing and/or sales directors elaborated based on Churchill et al.’s (2000) framework for sales management and planning and also on sales audit framework from Ryans and Weinberg (1981), closed questionnaires for salespeople of all the companies and also dealers (for Case B) combining nominal and ordinal scales. In total 5 sales conventions (2 of A and B, and 1 of C) were observed and documented, and several meetings on general sales issues were followed during two years.

The cases were analyzed independently. The cases reports were composed of a description of the company, its marketing mix, an environmental analysis, the sales management organization and finally their critical aspects on sales. Then, a crossed conclusion is made, contrasting the aspects identified and the selected frameworks for sales planning and management in the literature.

The model used to produce the three case studies and derive the conclusions is adapted from Yin (2001) and shown in the Figure 1.



Source: Authors based on Yin (2001).

Fig. 1. The Multiple Case Method

This article will show and discuss just the crossed conclusions report as a matter of size and relevance for the attainment of the research's objectives. Before, the selected frameworks for sales management and planning will be briefly presented and analyzed.

4. Frameworks for Sales Planning and Management

The table below shows five classical sales planning and management frameworks and their main group of activities. The extreme left column tries to group common steps suggested by the authors and the numbers in the columns below author names is the original order proposed by them.

Table 1

Overview of selected Sales Planning and Management Frameworks

Common Steps suggested	Churchill et al.	Ingram and La Forge	Dalrymple and Cron	Ryans and Weinberg	Chonko et al.
Environmental analysis and business planning	1. Environmental analysis		1. Business Planning	1. Environmental analysis	1. Environmental analysis
Marketing Planning	2. Marketing strategy definition		2. Marketing Planning	2. Marketing strategy and action plans	2. Marketing Planning
Sales Planning (and sales organization decisions)	3. Sales management activities definition	2. Sales strategy definition 3. Sales organization design	3. Sales Planning	3. Definition of the desired personal selling role 4. Sales Organization policies and procedures	3. Sales Planning
Salesman Role Perceived	4. Understanding of the salesmen performance determinants	1. Complete understanding of the salesforce function			
Topics in Human resources in Sales		4. Sales force development; Sales force Guiding		5. Territorial Sales Manager Implementation	4. Sales Staffing Implementation of sales activities
The Sales Process				6. Buyer-seller interaction	
Results	5. Results		4. Results on profit and customer satisfaction	7. Results	
Control	6. Sales Control		5. Sales Evaluation		5. Sales Control
Feedback		5. Determination of sales force efficacy and performance	6. Feedback on Performance		

Source: Elaborated by the authors based on Churchill et al. (2000), Ingram and LaForge (1992), Dalrymple and Cron (1995), Ryans and Weinberg (1981) and Chonko et al. (1992).

Churchill's (2000) framework is one of the most classic ones. It is composed of environmental analysis, the marketing strategy definition (regarding the design of the marketing mix) and then the

sales management activities which include account management, sales organization, sales planning, sales deployment, supervision, recruitment, selection, and motivation. The next phase is the understanding of the determinants of the role perceived by the salesman, which is defined by the sales management activities and also the external environment. The perceived role, together with the firm's sales activities will define the salesman performance. This performance can be then evaluated and feedback the marketing planning process to restart the process. Although complete, the present framework does focus the role perceived by the salesman and his performance. Also important sales organization decisions are grouped together. Finally, it appears not to guide sales management decisions.

Ingram e LaForge (1992)'s frameworks is also composed of six steps. First the authors suggest that the company and the sales managers must develop a complete understanding of the sales activity to enable them to manage properly the salespeople. Then the sales strategy is defined, which includes the definition of relationship strategies, or what level of relationship will be pursued by the salespeople with different clients and also a channel strategy which means the multiple channel choice. Sales organization tasks are related to sales organization topics and the sales force development and direction to the topics on human resources in sales. Finally, the determination of sales force efficacy and performance is related to the process of demand estimation, quota determination, sales budgets and evaluation procedures. This is also a broad and complete framework with additional aspects as compared to Churchill et al. (2000), since it includes the definition of relationship strategies and the multiple channel management.

Dalrymple and Cron (1995) provide a model with the first three steps composed of business, marketing and sales planning as the traditional marketing planning literature suggests. The sales plan is composed first of market access, definition of client relationships and operational budget and then by targeting, sales force organization, demand estimation, territory design and topics on human resources. Then these plans will lead to results on sales, profits and consumer satisfaction. The sales evaluation is done followed by the feedback provided to restart the process. Among all frameworks, this is maybe the most straightforward one.

Ryans and Weinberg (1981) presented a framework published in their article entitled "*Sales force management: integrating research advances*" which, although rather old, among the frameworks analyzed is the only one published as paper and not as the introduction of a sales management textbook. First the authors describe the interaction between the strategic, tactic and operational level, in which policies are implemented from the top to the bottom and information on results go the other way around. The framework starts with an internal and external situational analysis, then the definition of the marketing strategy and action plans follow. The sales planning is divided into three levels: Sales organization policies and procedures (which would be the strategic level), then the territorial sales manager implementation (the tactical level which means that the sales manager has to implement regionally what has been defined strategically) and finally the interaction between buyer and seller (the operational level where there is the sales process that may build satisfactory results).

Finally, Chonko's framework presents a sequence composed of environmental analysis, marketing and sales planning. This last one containing sales organization issues, the establishment of sales objectives and sales plans. Next, staffing contains the decisions on human resources in sales. Additionally, the authors suggest an implementation phase composed of motivation, compensation, sales support, communication mechanisms and delegation referring to the role of the sales manager. Finally, as a last step control activities are suggested including the design of report systems, performance standards, performance evaluation and corrective actions.

5. Gaps Between the Cases Analyzed and the Sales Management and Planning Frameworks

Some general information on the three cases analyzed is summarized in the table below. In the papers' complete version this information is presented and discussed in detail.

Table 2

Selected Information on Cases Analyzed

	Firm A	Firm B	Firm C
Products	Bovine semen, artificial insemination accessories and services	Irrigation equipment and services	Animal feed
Size of sales force	100	20	100
Type of contract	Independent representatives	Employed salespeople	Independent representatives
Specialization – sales structure	Territory	Territory	Territory
Compensation	20% Commission on total sales	Fixed salary	5% Commission on total sales
Other marketing channels	Direct sales for key accounts and TV	Specialized dealers	Direct sales dealers
Exclusivity	Only for direct competition products and firms	Total	Only for direct competition products and firms
Representatives who are 100% committed to the firm	42%	-	81%
Percentage of representatives turnover coming from the firm	70%	-	95%
Other products carried by representatives	Animal feed, iron fancies among others	-	Seeds, veterinarian products, among others

Source: Elaborated by the authors.

The crossed joint cases report has given some evidence that there are important areas where sales planning and management frameworks have to be completed or more detailed. There are 8 main gaps that definitely have been treated by the marketing or sales literature but are not well integrated into the presented frameworks. These are:

(Gap 1) Information and Communication management regarding the salespeople, territorial sales managers and the firm: all three companies showed dissatisfaction with the distance between salespeople, sales managers, and the firm. It could be seen during the interviews and also the attempts made at sales conventions:

“We feel that we could explore more the information on market developments, new product opportunities, competitor actions coming from our sales people (Company B). How could we improve information exchange among representatives (company C)? I feel my salespeople far away from the firm...How can my territorial sales managers function as a bridge between the firm and the salespeople and the market (Company A)? ”

Information management from the market to the firm is well discussed in the marketing literature, more specifically in that on marketing information systems and marketing research (Malhotra, 2001; Kotler, 2000). Despite the brief mentioning of Chonko et al. (1992), none of the analyzed frameworks inserts in some of their steps the design of information and communication flows, which can be worthy to add.

(Gap 2) Conflict management: all three companies showed conflicts related to the use of multiple marketing channels, more specifically on direct sales and among representatives or salespeople related to territory invasion. These led to several problems of marketing channel efficiency. In

other words the integration between the direct sales force and the marketing channels used is crucial and may deserve more emphasis. The marketing channel literature has discussed these conflicts, ways of conflict minimization and resolution (Geysks et al. 1999; Friedman, Furey, 1999; Brown; Day, 1981; Rosembloom, 1973) and authors in sales have also discussed the conflict risks of using several different formats (Zoltners et al., 2001).

(Gap 3) Territorial and other sales policies: A lot of time have been invested by the three companies in discussing the rules for selling across territories. What are the conditions where one salesman can sell to another territory, considering possible exceptions like new clients? What happens if a client wishes to be served by another representative and not the original one from the territory? Some answers given when asking representatives about their satisfaction with the firm, indicate the importance of this topic.

“The company should pay commission to the representatives from the territory from every sales done in the region, and it does not! (Company A). I feel other dealers and the firms’ direct salespeople as competitors, the company should make the rules clear in the territory and not leave us to cope with such unstable and critical issues! (Company B).”

Although the sales literature has discussed about specialization of salespeople, once a choice is made (for territories, clients, products, sales process or hybrid structure) some more issues are definitely left to be solved and the analyzed frameworks do not mention them.

(Gap 4) Definition of the sales manager’s role: The firms have showed strong dissatisfaction regarding the sales managers role. What are the major sales managers’ responsibilities, considering the tasks of sales management?

“Managing a sales team is different of what we have (representative from C). Our sales managers spend too much time selling and management tasks are left unsolved (marketing director B).”

Different authors have analyzed the sales manager’s function (Ingram et al., 2002; Futrell, 2003 among others) and the models of Dalrymple and Cron (1995), Chonko et al. (1992) and Ryans and Weingberg (1981) have also mentioned it. However, the responsibilities between sales management, territorial sales managers and salespeople on territory management have not been made clear by the frameworks.

(Gap 5) The choice between representatives and employed salesperson: Although the sales literature has shown the importance of this decision and its relationships with other decisions like those on compensation and control, and even on sales implementation (Albers, 2000b) and the cases have shown the difference between companies A and C (using representatives) and B (using employed salespeople), the general frameworks simply group it together with sales organization decisions. The make-or-buy decision in sales may deserve more emphasis and, in a sequential decision set, it could be positioned as one of the first choices a firm makes, considering all the analyses recommended by transaction cost economy and agency theory (Anderson, Weitz, 1986; Albers, 2000b). This decision has also been shown by Zoltners et al. (2001) in their go-to-market strategies as one of the very first steps in sales planning, after the market segmentation and the understanding of the critical work is needed by each market segment.

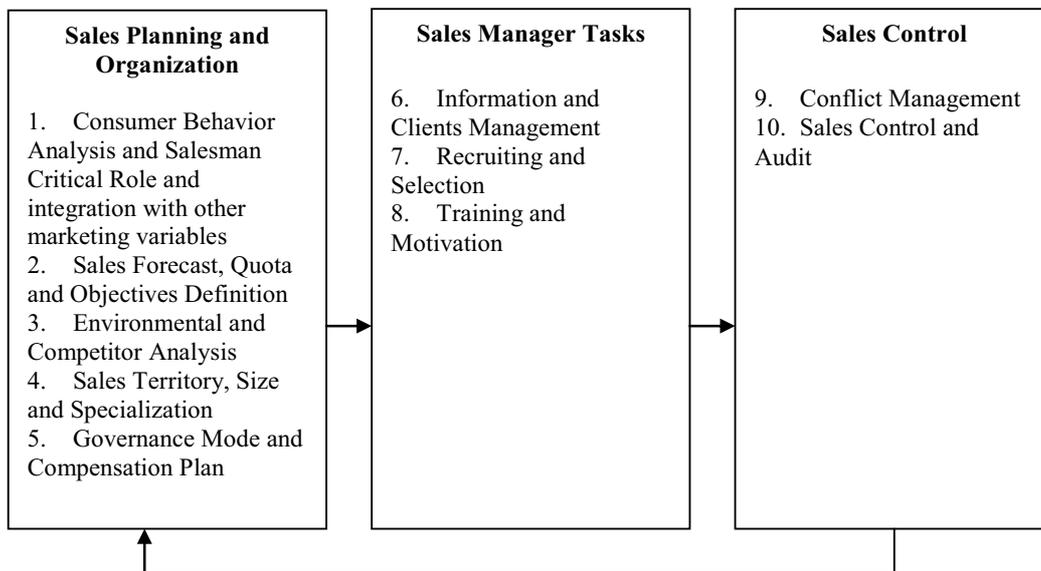
(Gap 6) Recommendation for the management of representatives: Once the choice for sales representatives have been made, several other important issues may emerge as the cases have shown. Much time has been invested in contract construction and revision for companies A and C, and alternative practices to try to avoid the pitfalls of using representatives. Neves (2003) has proposed a framework for building and reviewing marketing contracts. Moreover, ways to manage an outsourced marketing function had been shown to be an interesting research topic (Anderson, Weitz, 1986). Therefore, it might be interesting to add steps of sales representatives management in a sales management framework, when using them.

(Gap 7) Strategic and operational integration of sales with other marketing variables: As other marketing variables, sales has to be integrated into the marketing mix. The cases have shown how critical this aspect is to the firm's performance. The general frameworks have just mentioned this need when mentioning marketing planning, but the marketing literature has discussed the authority salespeople may have on pricing and its effects on profitability, the channel integration (discussed in gap 1), and the integrated communication plan. Also the idea of the salespeople as service provider shows the integration between the offer (or product mix) and the sales function. Based on the interviews with marketing and sales managers of the three firms, some guidelines are needed to show how to integrate the sales function into the marketing mix.

(Gap 8) Collective sales forces and support: All three companies have had clear opportunities to join their workforces with other companies, but up to the realization of the case studies, none of them has done it. Opportunities for collective actions in the sales area are also increasing due to short marketing budgets. Moreover, consumer surveys in the rural market have showed that bundling solutions are wanted by them significantly. None of the frameworks mentions evaluating collective actions in sales. Collective actions have been discussed by Oslon (1999) and the *Network Perspective* from Ford et al. (2002) e Gemunden et al. (1997) and may be integrated into a new framework.

6. The Framework Proposition

The proposed framework is showed in Figure 2 below:



Source: Authors.

Fig. 2. Proposed Framework for Sales Planning and Management

The sequence above tries to organize in three different phases the major sales decisions. Sales planning and organization stresses the consumer behavior analysis and the definition of the salesman critical role. It is important to understand what are the expected roles of the salespeople according to the target market. Besides, when thinking about this, it is needed to integrate the different marketing variable in order to strengthen the marketing efforts.

The second phase, the sales manager may think about the objectives in terms of results and activities he or she may expect from the sales team, totally aligned with the critical role defined in the Step 1. The traditional STEP and competitor analysis may be done in the Step 3 looking for implication for the sales force. Step 4 brings the decisions to the territory level, when the type of the

territory and the amount of salespeople, together with the type of specialization used may be decided to each territory specifically. Optimization models are very useful delineating these. Step 5, brings together two very important decisions, which are the governance mode (the use of sales reps or employed salespeople) and the definition of the remuneration plan (these two decisions were grouped because of the legal connection they normally have). In this step Transaction Cost Economy and Agency theories may be used to make these decisions. The paper complete version includes the design of side effects for the options in this step, and how to minimize side effects, once there is almost never an optimal choice regarding these two fundamental decisions.

The second phase highlights the sales manager role in bridging the information between the field (clients and salesman) and the headquarters, also in acquiring and maintaining a well prepared and motivates sales team. Step 5, the firm may design the information flows from the salesforce back to the firm, and in the opposite direction, the communication flow from the firm to the market. Steps 7 and 8 are related to acquiring and maintaining a well prepared and motivated sales team (which may be of responsibility of regional sales managers).

Finally the control phase is composed of two steps. Step 9 deals with conflict management (potential multiple distribution channel conflicts, territory policies conflicts, among other very usual in daily activities in sales management) and Step 10, when control measures may be designed and it has to be aligned with the critical salespeople role (Step 1), quotas definition (Step 3) and compensation (Step 5). Otherwise the Sales Plan will be inconsistent.

7. Conclusion and Limitations and Further Research

The favorable aspects of the proposed sequence, compared to the other frameworks, could be that it stresses, at the beginning of the sequence, the governance mode to regulate the relationship between the firm and its salespeople, and try to anticipate the side effects of this choice. Also it offers potential interfaces among marketing variables, trying to integrate the marketing efforts in a coordinated way, it inserts a topic of information and communication design within the sales organizational structure and inserts a topic for conflict management, dealing with channel conflict, territorial conflicts and others.

On the other hand, there are several limitations in this proposal. This sequence has not been tested yet, what makes impossible any commentary on its practical relevance. The sequence also has not been judged by marketers in order to know if the steps are applicable and they can facilitate the sales planning and management. The method, which has been used is subjective, containing clear influence of the researcher and the managers who were interviewed during the case elaboration. Also, the flexibility of the research method makes difficult the replication by other researcher, trying to reach similar results. Finally, the sequence is focused on one industry, which increases the chances of adaptability for the industry in case but the framework may be specific and contextual.

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