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## Interfacing and customer-facing: Sales and marketing selling centers<sup>☆</sup>

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### ABSTRACT

Organizations are turning to the collective knowledge of selling teams in order to manage increasingly complex customers and solutions. One specific cross-functional unit that organizations are commonly using when selling to business-to-business customers is a team of sales and marketing personnel. While the interface between sales and marketing has received attention in the literature, which notes the inherent advantages and challenges of incorporating both roles on a team, opportunities remain to examine sales and marketing selling centers (SMSCs): instances where sales and marketing jointly and directly interact on a relatively temporary basis in customer-facing situations. The authors utilize a discovery-oriented, theories-in-use inquiry to better understand customer-facing SMSC processes, facilitators, and outcomes. Based on insights captured from 29 in-depth interviews with informants who each served on SMSCs in both sales and marketing roles, this study extends sales research by providing a dual perspective of those working on SMSCs, thus enhancing the utility of such malleable selling teams.

### 1. Introduction

Rapidly changing and increasingly demanding customer preferences require alignment between marketing and sales in order to source customer insights and implement customer-centric strategies (Biemans, Makovec Brenčić, & Malshe, 2010; Malshe & Sohi, 2009a; Rouziès et al., 2005). Additionally, increasingly large customer organizations and buying centers require sales organizations to roll out sales and marketing teams when selling complex solutions to strategic accounts (Arnett & Badrinarayanan, 2005). Each of the above marketplace conditions illustrate the critical importance of sales and marketing personnel working together to successfully interface and develop strong relationships with buying center members within business-to-business (B2B) customer organizations (Jones, Dixon, Chonko, & Cannon, 2005). However, sales-marketing teams face a number of challenges as firms struggle to (a) retain sales and marketing functional distinctiveness while simultaneously coordinating efforts around organizational goals (Le Meunier-FitzHugh & Piercy, 2011); and (b) to balance externally customer-focused activities and internally team-focused activities that can hinder (job demands) or help (job resources) customer value creation (Sleep, Bharadwaj, & Lam, 2015).

Empirical focus on sales teams represents an important analytical shift occurring both within academic literature (Brown, Evans, Mantrala, & Challagalla, 2005) and in the approximate 75% of firms that use selling teams (Cummings, 2007). A team consisting of sales and marketing personnel is one specific cross-functional unit that organizations are widely utilizing in B2B customer exchanges. For example, sales and marketing practitioners are increasingly working closely to implement account-based marketing (ABM) strategies and drive revenue across their businesses; “marketing strategy that partners with sales to focus your combined energy on a more targeted approach to finding, engaging, and closing the accounts that really matter naturally aligns to the C-suite and the organization’s strategic goals” (Marketo, 2016, p. 2). Strategies such as ABM allow organizations to employ targeted account-based approaches utilizing both sales and marketing. As a result, 208% more revenue is generated by the marketing in companies that have aligned sales and marketing teams (Marketo, 2016).

Team selling achieves such firm-level performance results by leveraging what is referred to as pooled intelligence, which capitalizes on varied functional experiences and abilities across departments to increase the speed of learning, enhance coordination, improve

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strategy implementation, and offer better solutions to customers (Arnett & Badrinarayanan, 2005; Deeter-Schmelz & Ramsey, 1995; Mengüç, Auh, & Uslu, 2013). Sales-marketing teams therein collect complementary skills and insights inherent to each function's unique customer-centric role. Such capabilities include marketers' strategy creation skills, long-term foci, end-user insights, and market segmentation vantage points, as well as the parallel capabilities of salespersons' strategy implementation skills, opportunity-based foci, purchasing agent insights, and account-by-account vantage points (Biemans & Makovec Brenčič, 2007; Dothan, 2004; Homburg, Jensen, & Krohmer, 2008; Rouziès et al., 2005). That said, despite the numerous gains that collaboration between sales and marketing personnel offers for customer opportunities, such efforts are often sub-optimal for myriad reasons (Kotler, Rackham, & Krishnaswamy, 2006). The most common explanation is that sales and marketing personnel are frequently at odds (Smith, Gopalakrishna, & Chatterjee, 2006), which impacts their strategic outcomes (Malshe, 2011).

Conflict, non-cooperation, turf barriers, and negative stereotyping characterize the tepid relationship between sales and marketing functions (Dewsnap & Jobber, 2000). Research focusing on the critical factors that either contribute to or hamper the optimal functions of this sales-marketing interface (SMI) has emerged to tackle this thorny issue (Malshe, Al-Khatib, Al-Habib, & Ezzi, 2012). The SMI literature stream primarily concentrates on sources of sales-marketing conflict and/or sales-marketing integration devices (Homburg et al., 2008). However, while such research offers a strong conceptual framework for identifying obstacles and better integrating sales and marketing selling teams, questions surrounding why selling teams composed of both sales and marketing personnel struggle to work together cohesively and succeed in advancing customer-facing initiatives remain. Notable differences also exist between SMIs and sales and marketing selling centers (SMSCs), instances where sales and marketing jointly and directly interact on a relatively temporary basis in customer-facing situations, thus the transfer of knowledge across conceptual domains remains imprecise. To address this perplexity, research focused on the temporary nature of SMSCs, intra-team processes, factors that foster strong SMSC alignment, and individualized stakeholder gains and losses is essential.

Reflecting this research agenda, we ask the following research questions: How does the temporary nature of SMSCs dictate individual and collective preparation and follow-up activities? What factors facilitate SMSCs? What are the positive and negative outcomes of SMSCs? Our research employs a discovery-oriented, theories-in-use perspective. In-depth interviews were conducted with 29 participants who were theoretically sampled based on their unique experiences working on SMSCs with B2B customers, both as a marketer and as a salesperson. The goal of utilizing this approach is to critically assess the dual perspectives and processes performed by SMSC members, the facilitating conditions, and the desirable and undesirable outcomes of SMSCs.

Findings from our participant insights extend selling team research, an area observed in the literature as understudied and in need of more empirical work to explicate unearthed inter-functional and intra-team nuances, particularly in the context of selling centers. Specifically, our findings identify how sales organizations respond to emergent account-based opportunities with fluid sales-marketing teams, as well as when SMSCs are more or less likely to have a positive effect. Our primary scholarship contributions answer calls in the literature for a better understanding of intra-team processes and moderators of successful sales team (e.g., Ahearne, MacKenzie, Podsakoff, Mathieu, & Lam, 2010; Evans, McFarland, Dietz, & Jaramillo, 2012; Jones et al., 2005; Mengüç et al., 2013), with a focus on selling centers.

## 2. Literature review

We review two streams of literature relevant to advancing the SMSC research agenda: SMIs and selling teams. Table 1 provides an overview

of research within both bodies of literature. As the table covers the research focus, design and sample, and major findings, a number of initial insights underscore the importance of studying SMSCs. With regard to research foci, early and seminal research identifies two focal types of selling teams: core selling teams (i.e., relatively permanent and stable selling teams) and selling centers (i.e., relatively temporary and fluid selling teams) (Moon & Strong, 1994). Since this early conceptualization, scholarly efforts have strongly gravitated towards core selling teams (e.g., Arnett & Badrinarayanan, 2005; Bradford, Challagalla, Hunter, & Moncrief, 2012; Dixon, Gassenheimer, & Barr, 2002) and/or dedicated strategic account management teams (e.g., Arnett, Macy, & Wilcox, 2005; Jones et al., 2005). The study of selling centers, particularly a focus on centers capturing the combined efforts of salespeople and marketers (i.e., SMSCs), is noticeably absent from the literature. This lack of focus on SMSCs is a critical shortcoming given the oft malleable structures of selling teams that mirror the fluidity of buying centers and are assembled to respond to the specific needs of a selling opportunity. The major findings of selling team research have tended to evaluate performance based on generalized team- or firm-level metrics (e.g., team performance, firm performance). Given the short-term nature of SMSCs and the independent role-based goals that remain intact for each SMSC member, considering team selling outcomes specific to each function (e.g., salesperson outcomes, marketer outcomes, customer outcomes) is essential.

Two additional shortcomings are evident with regard to the research designs and samples. The first is that across the SMI and sales team literature streams, research has not utilized informants who all possess both sales and marketing experiences. Scholarship has made numerous methodological advances in both areas and collected complex multi-level and/or multi-source data sets, but understanding SMIs and/or SMSCs from a singular informant who can detail the dual processes, uniqueness, and interdependencies of each role and associated outcomes has the potential to advance the knowledge. The second is that given the novelty of SMSCs as a research focus, a discovery-oriented inquiry is most appropriate to establishing the groundwork for this phenomenon. However, while the SMI literature has made considerable advancements via the application of qualitative approaches, the selling team literature stream has not embraced qualitative methodology. Yet, a qualitative research inquiry aimed at studying SMSCs will identify opportunities for future research and apply an original methodological approach to the field.

### 2.1. Sales marketing interface

The interface between sales and marketing is receiving increasing attention (Guenzi & Troilo, 2006; Malshe, Johnson, & Viio, 2017; Massey & Dawes, 2007a; Troilo, De Luca, & Guenzi, 2009), much of it concentrated on how the interface can be improved (Le Meunier-FitzHugh & Piercy, 2011). Rouziès and Segalla (2012, p.1298) summarize extant research focused on optimizing SMIs as examinations of SMI configurations (Homburg et al., 2008), mind sets (Homburg & Jensen, 2007), influence (Homburg, Workman, & Krohmer, 1999), dispersion (Krohmer, Homburg, & Workman, 2002), revenue implications (Smith et al., 2006), and activity planning (Strahle, Spiro, & Acito, 1996). Across these domains, there emerges the collective agreement that increasingly competitive markets and rapidly evolving customer preferences require effective teamwork and real-time responses between sales and marketing, which in turn necessitates strong integration, communication, and collaboration between the two functions (Malshe, 2010).

Sales and marketing teams are supposed to work interdependently and in harmony, jointly ensuring coordinated delivery of customer value (Guenzi & Troilo, 2007; Kotler et al., 2006; Malshe & Sohi, 2009a), superior business performance (Dewsnap & Jobber, 2002; Hughes, Le Bon, & Malshe, 2012; Le Meunier-FitzHugh & Piercy, 2007a; Rouziès & Segalla, 2012), and enhanced learning capabilities

**Table 1**  
Overview of research on sales-marketing interface and selling teams.

Study	Focus of study	Study design and sample	Major findings from study
<b>Sales-marketing interface</b>			
Johnson and Boeing (2016) – <i>JPSSM</i>	SMI in emerging economies	<ul style="list-style-type: none"> <li>• Empirical, Qualitative</li> <li>• 29 sales and marketing professionals in Brazil</li> </ul>	<ul style="list-style-type: none"> <li>• SMIs in emerging economies manifest from group orientation and interaction</li> <li>• Comparisons and contrasts provided with regard to SMIs in emerging economies versus those in developed economies</li> </ul>
Rouziès and Hulland (2014) – <i>JAMS</i>	SMI influence on social capital and firm value creation	<ul style="list-style-type: none"> <li>• Empirical, Quantitative</li> <li>• 203 sales and marketing professionals from 38 firms</li> </ul>	<ul style="list-style-type: none"> <li>• Social capital embedded in SMIs can inhibit but also enhance performance depending on characteristics of customers; SMIs do not always pay off</li> <li>• SMIs require different levels of management depending on degree of customer concentration</li> </ul>
Hughes et al. (2012) – <i>JPSSM</i>	SMI coordination and conflict with other functional areas within the firm	<ul style="list-style-type: none"> <li>• Empirical, Qualitative</li> <li>• 25 managers across multiple industries</li> </ul>	<ul style="list-style-type: none"> <li>• Synergistic levers (vision, alignment, process, information, knowledge, decision, resources, culture) must be shared across the SMI and other interfaces within the firm to achieve firm market-based capabilities</li> <li>• Effective cross-functional coordination of SMI enables market-based capabilities that drive firm competitive advantage</li> </ul>
Malshe et al. (2012) – <i>JBR</i>	SMIs in emerging economies	<ul style="list-style-type: none"> <li>• Empirical, Qualitative</li> <li>• 37 sales and marketing professionals in Saudi Arabia</li> </ul>	<ul style="list-style-type: none"> <li>• Firm contexts (e.g., power distance, authority) shape intra-firm mechanisms and processes between firm leadership and sales and marketing departments</li> <li>• SMI integration devices do not operate universally across firm contexts</li> </ul>
Le Meunier-FitzHugh and Piercy (2011) – <i>JPSSM</i>	Sales and marketing collaboration's impact on firm performance	<ul style="list-style-type: none"> <li>• Empirical, Quantitative</li> <li>• 146 sales and marketing professionals in United Kingdom</li> </ul>	<ul style="list-style-type: none"> <li>• Collaboration between sales and marketing has positive relationship with market orientation</li> <li>• Combined effect of above has positive relationship with firm performance</li> </ul>
Malshe (2011) – <i>JBIM</i>	Contextual factors that affect sales and marketing connections	<ul style="list-style-type: none"> <li>• Empirical, Qualitative</li> <li>• 47 sales and marketing professionals</li> </ul>	<ul style="list-style-type: none"> <li>• Linkages (structure, language, process) fortify stronger connections between sales and marketing while boundary conditions (firm hierarchy, time horizon) influence impact of linkages on sales-marketing connection</li> <li>• Two newly-identified sales-marketing linkages (social, philosophical)</li> </ul>
Biemans et al. (2010) – <i>IMM</i>	SMI configurations in B2B firms	<ul style="list-style-type: none"> <li>• Empirical, Qualitative</li> <li>• 101 sales and marketing professionals in United States, Netherlands, Slovenia</li> </ul>	<ul style="list-style-type: none"> <li>• SMI configurations along four integration continuum factors: communication patterns, structure, information sharing, collaboration, strategic outcomes</li> <li>• No configuration inherently superior, must fit to environment</li> <li>• SMI configurations evolve over time, influenced by firm size, scope of operations, customer base</li> </ul>
Malshe (2010) – <i>JBR</i>	How salespeople interpret marketers' credibility	<ul style="list-style-type: none"> <li>• Empirical, Qualitative</li> <li>• 33 sales professionals</li> </ul>	<ul style="list-style-type: none"> <li>• Salesperson view of marketer credibility as source of conflict within SMIs</li> <li>• Provides micro-level understanding of potential sources of conflict and integration devices within SMIs</li> </ul>
Dewsnap and Jobber (2009) – <i>EJM</i>	SMI integration devices	<ul style="list-style-type: none"> <li>• Empirical, Qualitative</li> <li>• 20 sales and marketing professionals in United Kingdom</li> </ul>	<ul style="list-style-type: none"> <li>• Two primary types of SMI integration devices in consumer package good firms: trade marketing and category management</li> <li>• Integration device effectiveness, not mere existence, differentiates between high and low levels of SMI collaboration and inter-group relations</li> </ul>
Malshe (2009) – <i>JSM</i>	Sales and marketing roles that facilitate and challenge strategic sales firms	<ul style="list-style-type: none"> <li>• Empirical, Qualitative</li> <li>• 38 sales and marketing professionals</li> </ul>	<ul style="list-style-type: none"> <li>• Identify overlaps and differences of sales and marketing role expectations and process factors within SMIs</li> <li>• Detailed and stark comparison between how sales and marketing view themselves and their counterparts</li> </ul>
Malshe and Sohi (2009b) – <i>JAMS</i>	Marketing strategy making within the SMI	<ul style="list-style-type: none"> <li>• Empirical, Qualitative</li> <li>• 58 sales and marketing professionals; 11 marketing professionals in focus group</li> </ul>	<ul style="list-style-type: none"> <li>• Marketing strategy making within SMI is three-stage process of groundwork, transfer, follow-up</li> <li>• Marketing strategy making requires equal involvement of sales and marketing</li> </ul>
Malshe and Sohi (2009a) – <i>JPSSM</i>	Sales buy-in of marketing strategies	<ul style="list-style-type: none"> <li>• Empirical, Qualitative</li> <li>• 49 sales and marketing professionals</li> </ul>	<ul style="list-style-type: none"> <li>• Sales buy-in consists of four key components: objective persuasion, sensitivity to reality, involvement in strategy creation, positioning for success</li> <li>• Sales buy-in determined by three firm factors (inter-functional walls, cultural divide, inter-functional relationships) and two contextual conditions (strategy absorption time, hierarchy)</li> </ul>
Homburg et al. (2008) – <i>JM</i>	Multidimensional model of SMIs	<ul style="list-style-type: none"> <li>• Empirical, Quantitative</li> <li>• 337 European firms</li> </ul>	<ul style="list-style-type: none"> <li>• Five archetypes of SMIs identified based on: information sharing, structural linkages, power, orientations, sales and marketing knowledge</li> <li>• Most successful SMI configurations characterized by strong structural linkages and high marketing knowledge</li> </ul>
Biemans and Makovec Brenčič (2007) – <i>EJM</i>	SMIs across cultures	<ul style="list-style-type: none"> <li>• Empirical, Qualitative</li> <li>• 11 Dutch firms; 10 Slovenian firms</li> </ul>	<ul style="list-style-type: none"> <li>• SMIs play critical role in a firm's ability to become market oriented</li> <li>• SMIs organization and management operates uniquely across B2B firms in different contexts and countries</li> </ul>
Le Meunier-FitzHugh and Piercy (2007b) – <i>EJM</i>	SMI collaboration's impact on firm performance	<ul style="list-style-type: none"> <li>• Empirical, Qualitative</li> <li>• 3 case studies</li> </ul>	<ul style="list-style-type: none"> <li>• Nine antecedents to SMI collaboration, grouped as three factors: integrators, facilitators, management attitudes</li> </ul>

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Table 1 (continued)

Study	Focus of study	Study design and sample	Major findings from study
Massey and Dawes (2007b) – <i>EJM</i>	Nature of working relationship between sales and marketing managers	<ul style="list-style-type: none"> <li>● Empirical, Quantitative</li> <li>● 101 marketing managers in Australia</li> </ul>	<ul style="list-style-type: none"> <li>● towards coordination</li> <li>● Senior management plays a critical role in improving SMI collaboration</li> <li>● Improved SMI coordination and collaboration improves firm performance</li> <li>● Cognitive-based trust and affect-based trust both have desirable effects on functional and dysfunctional conflict between sales and marketing managers</li> <li>● Greater affect-based trust exists among marketing managers with greater levels of sales experience</li> </ul>
Smith et al. (2006) – <i>JMR</i>	Effective elements of sales-marketing communication	<ul style="list-style-type: none"> <li>● Empirical, Quantitative</li> <li>● 6068 purchasing events; company records</li> </ul>	<ul style="list-style-type: none"> <li>● Revenue and profit implications of improved sales-marketing communication</li> <li>● Optimization model of firm marketing communication timing on sales follow-up and conversion efficiencies provided</li> </ul>
Beverland et al. (2006) – <i>JBIM</i>	Cultural frames that characterize sales and marketing	<ul style="list-style-type: none"> <li>● Empirical, Qualitative</li> <li>● 44 sales and marketing professionals from 4 firms/ industries</li> </ul>	<ul style="list-style-type: none"> <li>● Conflict between sales and marketing due to differences in cultural beliefs about scope and focus of activity, time focus, valid sources of knowledge, perceived status, relationship to business environment</li> <li>● Removal of status barriers and providing sales with strategic voice are key SMI integration devices</li> </ul>
Selling teams Sleep et al. (2015) – <i>JAMS</i>	Customer boundary spanning activities and selling team performance	<ul style="list-style-type: none"> <li>● Empirical, Quantitative</li> <li>● 167 sales professionals; company records</li> </ul>	<ul style="list-style-type: none"> <li>● Coordination of internal and external boundaries create job demands (hinder) and job resources (help) that influence value creation and appropriation, tension between managing external and internal selling team activities</li> <li>● Customer boundary spanning's impact on customer satisfaction (substitute) and selling team performance (complement) contingent on role expectations</li> </ul>
Weinstein and Mullins (2012) – <i>JPSSM</i>	Technology adoption of selling teams	<ul style="list-style-type: none"> <li>● Empirical, Quantitative</li> <li>● 673 sales professionals from 224 selling teams / 122 managers</li> </ul>	<ul style="list-style-type: none"> <li>● Team experience strong antecedent to technology adoption within selling team, individual (experience) not an antecedent</li> <li>● Selling team technology adoption accentuated by teams who accept management goals and attenuated by empowerment of teams by management</li> </ul>
Bradford et al. (2012) – <i>JPSSM</i>	Key drivers for structuring selling teams	<ul style="list-style-type: none"> <li>● Conceptual</li> </ul>	<ul style="list-style-type: none"> <li>● Two dominant factors drive success of core selling teams: nature of account needs and pattern of economic returns</li> <li>● Suggested metrics for evaluating core selling team performance: firm-level factors (customer lifetime value, sales volume, profit, innovations, efficiency, effectiveness); team factors (compensation and quota, sales volume, effectiveness); environmental factors (client climate, industry effect); internal firm factors (team conflict, team collaboration and cohesiveness, communication, proximity, social integration)</li> </ul>
Badrinarayanan, Madhavaram, and Granot (2011) – <i>JPSSM</i>	Global virtual selling team (GVST) effectiveness	<ul style="list-style-type: none"> <li>● Conceptual</li> </ul>	<ul style="list-style-type: none"> <li>● Develop understanding of GVSTs and conceptualize GVST effectiveness</li> <li>● Identify components of environment as well as GVST intellectual and social capital that enhance GVST effectiveness</li> </ul>
Ahearne et al. (2010) – <i>JMR</i>	Consensus and selling team performance	<ul style="list-style-type: none"> <li>● Empirical, Quantitative</li> <li>● 185 sales professionals; company records</li> </ul>	<ul style="list-style-type: none"> <li>● Leadership empowerment behaviors and team interpersonal climate enhance selling team potency and performance, moderated by team consensus</li> <li>● Team potency translates into selling team performance through external role (team helping behavior) and in-role (team effort) behaviors</li> </ul>
Rapp, Ahearne, Mathieu, and Rapp (2010) – <i>IJRM</i>	Managing selling teams in a virtual environment	<ul style="list-style-type: none"> <li>● Empirical, Quantitative</li> <li>● 651 sales professionals from 218 selling teams; company records</li> </ul>	<ul style="list-style-type: none"> <li>● Empowering leadership behaviors improve selling team planning processes, moderated by selling team experience</li> <li>● Advance theory of selling team leadership and composition influence on selling team effectiveness</li> </ul>
Arnett et al. (2005) – <i>JPSSM</i>	Nature of selling team-buyer relationships	<ul style="list-style-type: none"> <li>● Empirical, Quantitative</li> <li>● 30 key informants, team managers; customer interviews; company records</li> </ul>	<ul style="list-style-type: none"> <li>● Selling team effectiveness enhances the degree of supplier-buyer collaboration as well as the value of the strategic partnership</li> <li>● Selling teams influence supplier sell-through (i.e., competitive advantage) and relationship commitment of strategic customers</li> </ul>
Jones et al. (2005) – <i>JPSSM</i>	Key accounts and selling teams	<ul style="list-style-type: none"> <li>● Conceptual</li> </ul>	<ul style="list-style-type: none"> <li>● Develop understanding of how firm and interpersonal relationships influence selling teams, as well as how selling teams provide learning role for firms</li> <li>● Five key team selling relationships explicated: members of same team, members of different teams within firm, selling team and buying center, selling team and other groups in selling firm, selling team and firm strategy</li> </ul>
Arnett and Badrinarayanan (2005) – <i>JPSSM</i>	Influence of CRM on core selling team abilities	<ul style="list-style-type: none"> <li>● Conceptual</li> </ul>	<ul style="list-style-type: none"> <li>● Core selling team design (cross-functionality, alignment), processes (communication, common goals), and contextual characteristics (support system connectedness, empowerment) enhance selling team effectiveness</li> </ul>

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Table 1 (continued)

Study	Focus of study	Study design and sample	Major findings from study
Rangarajan et al. (2004) – IMM	Selling team learning and organizational readiness for change	• Conceptual	<ul style="list-style-type: none"> <li>• Core selling teams enhance development of competencies (knowledge management, relationship marketing) vital to a needs-driven CRM strategy</li> <li>• Propositions provided on the impact of organizational readiness for change on selling team learning, moderated by technical turbulence, market turbulence, competitive intensity</li> <li>• Selling team learning impacts individual knowledge, skills, abilities</li> </ul>
Dixon et al. (2002) – JPSSM	Conflict response within core selling teams	• Conceptual	<ul style="list-style-type: none"> <li>• Core selling team outcomes improved by monitoring responses to conflict</li> <li>• When relational or process conflicts exist, internal cognitive voice behaviors and intervention within teams are response techniques</li> </ul>
Perry et al. (1999) – JPSSM	Selling team effectiveness	• Conceptual	<ul style="list-style-type: none"> <li>• Conceptualize empowered selling teams and shared leadership process</li> <li>• Team member characteristics and vertical leadership influence shared leadership, shared leadership influences selling team effectiveness</li> </ul>
Deeter-Schmelz and Ramsey (1995) – JPSSM	Conceptualization and formalization of selling teams	• Conceptual	<ul style="list-style-type: none"> <li>• Conceptualization of selling and buying teams as foundation for research stream focused on these multidimensional relationships</li> <li>• Functions and roles of selling and buying teams reviewed</li> </ul>
Moon and Strong (1994) – JPSSM	Conceptualization and formalization of selling teams	• Conceptual	<ul style="list-style-type: none"> <li>• Two types of selling teams proposed: core selling teams, selling centers</li> <li>• Organizing framework of issues involving selling teams and their operations</li> </ul>

JPSSM = Journal of Personal Selling & Sales Management; JAMS = Journal of the Academy of Marketing Science; JBR = Journal of Business Research; JBIM = Journal of Business & Industrial Marketing; IMM = Industrial Marketing Management; EJM = European Journal of Marketing; JSM = Journal of Strategic Marketing; JM = Journal of Marketing; JMR = Journal of Marketing Research; IJRM = International Journal of Research in Marketing.

(Guenzi & Troilo, 2006). Marketing generates leads, which sales acts on. Sales teams are supposed to gather unique customer insights that help marketers create strategy (i.e., strategy creation; Dewsnap & Jobber, 2000; Rouziès et al., 2005), and then marketing is expected to deliver and communicate customer-directed strategies to salespeople for implementation (i.e., strategy execution; Biemans et al., 2010; Kotler et al., 2006; Malshe & Sohi, 2009b). However, reports suggest that sales ignores as much as 70% of the leads that marketing generates (i.e., sales lead black hole; Biemans & Makovec Brenčič, 2007; Smith et al., 2006; Watkins, 2003). Furthermore, salespeople often remain on the sidelines during marketing strategy creation (Malshe, Al-Habib, Al-Torkistani, & Al-Khatib, 2013; Malshe & Sohi, 2009b). Consequently, 80 to 90% of the content marketing produces is considered useless by salespeople (Schmonsees, 2005), and marketers often fail to capture sales teams' commitments to implement strategy (i.e., sales buy-in; Malshe & Sohi, 2009a).

Inter-functional conflict often explains such weaknesses in teamwork, cross-functional distrust, and interface withdrawal (Massey & Dawes, 2007b; Song, Xie, & Dyer, 2000). As a result, research has called for detailed explorations of the factors detrimental to SMIs, specifically citing the value of qualitative methodologies (Johnson & Boeing, 2016; Malshe, 2010) and devices that can build stronger connections between the two functions (Kotler et al., 2006; Le Meunier-FitzHugh & Piercy, 2011; Malshe, 2011). However, it has been suggested that SMIs exist on a continuum, “with firms on one end lacking a separate marketing function and firms at the other end of the continuum having sales and marketing as integrated functions with shared objectives” (Biemans et al., 2010, p.184). However, much of the research on SMIs focuses on typical or average configurations (Homburg et al., 2008). Thus, research on how universal the factors are that impact inter-functional coordination is inconclusive (Malshe, Johnson, & Viio, 2017), as SMIs operate across a spectrum from conventional configurations to contexts in which sales and marketing act as a singular selling team (i.e., SMSC).

Organizations may foster stronger strategic bonds between sales and marketing through a variety of mechanisms (Le Meunier-FitzHugh & Piercy, 2007a; Smith et al., 2006), as well as reduce the conflict

between the two functions (Cespedes, 1993; Guenzi & Troilo, 2006; Matthyssens & Johnston, 2006). However, a review of such sources of conflict and their corresponding integration devices from the SMI literature suggests that the distinction between SMIs and SMSCs is important, as many of the explanations of sales and marketing discord are seemingly less applicable to SMSCs. For example, divergent goals between the functions (Strahle et al., 1996) should converge as SMSCs work towards common customer objectives, and physical separation (Lorge, 1999) should become negligible as SMSCs work in close proximity. Poor coordination (Colletti & Chonko, 1997) should have less of an impact as SMSCs require increased synchronization, and questions about how sales-marketing counterparts contribute to performance (Rouziès et al., 2005) should fade as SMSCs observe the direct contributions that each role adds to the team output. Lastly, differences in cultural frames that weaken integration (Beverland, Steel, & Dapiran, 2006) should be celebrated as SMSCs aim to leverage pooled knowledge. Thus, as SMI research suggests harmony through processes such as the creation of joint sales-marketing customer interactions (Johnson & Boeing, 2016; Malshe, 2010; Piercy, 2006), as is found in SMSCs, a subsequent set of unique conflicts and integration devices may ensue. Research focused on explicating the nature of SMSCs and the factors that facilitate alignment among SMSC stakeholders will extend the current body of knowledge.

## 2.2. Selling teams

Deeter-Schmelz and Ramsey (1995, p.49) conceptualize selling teams as “teams responsible for customer relationships, sales strategy, and sales transactions, and comprised of selling organization members who possess complementary skills, who are committed to a common purpose, performance goals, and a selling approach for which they hold themselves mutually accountable.” Such teams can be relatively permanent and work as a dedicated team with a specific customer (i.e., core selling teams) or they can work as a malleable team towards relatively temporary and intermittent aims (i.e., selling centers) (Moon & Strong, 1994). Across these conceptualizations, research notes intra-

organizational benefits stemming from the creation of selling teams (e.g., improved SMI, enhanced information integration, shared explicit and tacit knowledge, individual learning; see [Arnett & Badrinarayanan, 2005](#); [Deeter-Schmelz & Ramsey, 1995](#); [Malshe, 2010](#); [Moon & Strong, 1994](#); [Rangarajan, Chonko, Jones, & Roberts, 2004](#)). Additionally, inter-organizational benefits (e.g., better solutions that meet the needs of key customers, improved goodwill and trust between buyers and sellers, enhanced business relationships; see [Arnett & Badrinarayanan, 2005](#); [Mengüç et al., 2013](#)) have also been identified. In fact, customers tend to view selling teams as a collection of trusted advisors who provide knowledge and expertise rather than as a collection of sellers aimed at achieving supplier goals ([Arnett et al., 2005](#)). However, selling teams struggle to realize their full potential and can be met with individual and organizational resistance ([Perry, Pearce, & Sims, 1999](#)).

There are challenges in applying insights from general team research to the particulars of an SMSC and in generalizing findings observed across individual-level determinants of sales performance to the sales team level ([Ahearne et al., 2010](#)). As stated by [Evans et al. \(2012, p.101\)](#), “the factors that make individual salespeople effective may not make them good sales team performers, or in some cases even poor sales team performers.” One explanation of this dissonance may be the varying cultures, perspectives, and roles of those on selling teams who manifest the specific factors that impact their success. Research notes a contrast between qualities at the individual level that may spur sales success yet lead to dysfunctional team dynamics that weaken team performance (e.g., creativity, adaptability; [Evans et al., 2012](#)). That said, perhaps an explanation for the multi-faceted interplay that determines desirable or undesirable effects of such individual-level factors exists in between the marketing and sales perspectives. The boundary conditions that moderate the effectiveness of marketing and/or sales personnel within SMSCs are also noteworthy. Thus, dedicated research on SMSCs is necessary to advance the understanding of the processes and factors that facilitate SMSC effectiveness.

Extensions of extant research suggest myriad influences on improved intra- and inter-organizational team performance outcomes, including internal coordination of team activities and goals, trust and interdependence, conflict and communication, shared values, empowering leadership, supervisory support, conflict response, knowledge sharing, and knowledge combination ([Ahearne, Mathieu, & Rapp, 2005](#); [Deeter-Schmelz & Ramsey, 1995](#); [Dixon et al., 2002](#); [Mengüç et al., 2013](#)). While such recommendations are useful for improving SMSCs and their opportunity-directed outcomes, it is unclear exactly how each stakeholder (e.g., salesperson, marketer) may perceive such recommendations, which team member should take ownership of and direct these processes, and what factors across each function moderate the effectiveness of achieving desired SMSC outcomes. Thus, research should consider cultural gaps across sales and marketing personnel (see [Beverland, 2001](#); [Beverland et al., 2006](#); [Dewsnap & Jobber, 2002](#)) by examining the unique perspectives of both salespeople and marketers in terms of optimizing SMSCs.

### 3. Method

Qualitative research is an effective method of inquiry when a complex, nuanced topic has received scant empirical attention, precluding the existence of frameworks and theories ([Johnson, 2015](#)). The undeniably complex phenomenon of SMSCs is conspicuously absent from the literature. Thus, a qualitative research design is ideal for this examination, for which we employ the multi-firm, theories-in-use approach. A theories-in-use approach gleams key insights by utilizing input from multiple participants in cases germane to the phenomena of interest ([Zaltman, LeMasters, & Heffring, 1982](#)). This methodological approach complements our desire to provide a detailed explication of this multifaceted subject. We conducted our theories-in-use examination in line with previously-published marketing exemplars (e.g., [Challagalla, Murtha, & Jaworski, 2014](#); [Friend & Malshe, 2016](#)).

#### 3.1. Sample and data collection

Our research used theoretical sampling, which involves the selection of participants possessing extensive knowledge on the researchers' topic ([Strauss & Corbin, 1998](#)) and is a common approach in marketing research ([Johnson & Sohi, 2016](#); [Kohli & Jaworski, 1990](#); [Tuli, Kohli, & Bharadwaj, 2007](#)). To better understand the intricacies of SMSCs, we sought participants with experience in both sales and marketing roles in SMSCs. As such, all participants have been both salespeople and marketers in joint sales and marketing interactions with B2B customers. Such specific participant inclusion criteria assured balanced perspectives of both roles within this interaction. By contrast, sampling from those with either exclusively sales experience or exclusively marketing experience may have resulted in a territorially-biased appraisal of the phenomenon. Our approach ensured that all our participants have seen the phenomenon of interest from both sides of the sales-marketing vantage point.

Participants were relatively experienced (9.8 years' experience on average), which compares favorably to other samples in B2B research (e.g., [Ahearne, Jelinek, & Rapp, 2005](#); [Do Cho & Chang, 2008](#); [Guenzi, Georges, & Pardo, 2009](#); [Limbu, Jayachandran, & Babin, 2014](#); [Schillewaert, Ahearne, Framback, & Moenaert, 2005](#)). Given that variety increases confidence in the data's robustness ([Creswell, 2007](#)), we collected data from participants in many different companies and industries, including transportation, pharmaceuticals, industrial products, consumer goods, and entertainment. Our participants worked on a spectrum of small (e.g., 10 employees) to large (e.g., 66,000 employees) companies, representing a diversity of company sizes. These sources of variation within our theoretical sample aligns with the practice of maximizing variance espoused by [Glaser and Strauss \(2009\)](#) and applied in B2B research (e.g., [Aarikka-Stenroos & Jaakkola, 2012](#); [Johnson & Sohi, 2016](#)). [Table 2](#) further details our sample.

Participant interviews were conducted over a nine-month span and ranged in length from 30 to 90 min. A semi-structured interview guide consisting of several open-ended questions guided the interviews, while follow-up questions were consistently used to probe participants on their key insights. Participants were encouraged to discuss in detail their experiences concerning SMSCs' benefits, drawbacks, associated actions, and facilitating factors. We administered the interviews in person and via telephone, recording all dialogue for subsequent transcription and analysis. Participant interviews persisted until theoretical saturation was reached, which occurs when no new perspectives or insights emerge from the acquisition of additional data ([Creswell, 2007](#)). We reached theoretical saturation at 29 interviews, which aligns with the established guideline of “20 to 30 individuals to develop a well saturated theory” ([Creswell, 2007, p. 126](#)).

#### 3.2. Data analysis and reliability

Participant quotations were first coded using in-vivo codes. We analyzed the data and developed codes based upon the participants' language ([Corbin & Strauss, 2008](#)). We then examined these quotations and classified all codes into higher-order categories. We first organized the codes into first-order themes reflective of the component code elements by using common threads connecting the initial codes. For example, the initial codes of marketing brings the wow factor, marketers are the heavy hitters in the presentation, marketing can enable customers and salespeople to look like rock stars, marketers handle the data-part of the presentation, and marketing's job to create the story were aggregated into the first-order category of marketing facilitators. We subsequently axially coded these first-order categories to build the emergent framework of the findings ([Corbin & Strauss, 2008](#)). This framework consists of overarching themes from the analysis, including processes performed, facilitators, and outcomes of SMSCs (see [Table 3](#) for overview of initial codes, first-order categories, and second-order themes).

**Table 2**  
Respondent details.

Case	Title	Industry	Firm size (employees)	Sales experience	Marketing experience	Age	Gender
1	Marketing Manager	Entertainment	1300	2	1	29	F
2	Director of Product Development	Financial Services	3500	2	4	53	M
3	Marketing Agronomist	Agricultural Products	16,000	9	2	52	M
4	General Manager	Printing	6500	11	6	58	M
5	Senior Vice President of Strategy and Development	Business Services	26,500	7	19	48	M
6	Senior Director of Integrated Marketing	Broadcasting	25,600	7	15	46	M
7	Sales and Marketing Leader	Agricultural Products	12,300	2	5	38	M
8	Director of Sales and Marketing	Building Materials	70	3	2	36	M
9	Director of Marketing	Facilities Services	2912	1	2	39	F
10	Senior Brand Manager	Book Publisher	6000	3	5	39	F
11	Director	Entertainment	20,915	1	4	33	M
12	Marketing Manager	Newspaper	14,000	4	10	40	F
13	Marketing Manager	Healthcare	46,000	4	13	46	F
14	Executive Marketing Director	Pharmaceuticals	38,000	7	1	35	F
15	Marketing Manager	Book Publisher	6000	3	1	28	F
16	Vice President of Marketing	Security	5000	4	5	54	M
17	Business Director	Agricultural Products	1800	16	5	44	M
18	Vice President of Global Innovation	Construction Products	65,000	4	8	59	M
19	Marketing Manager	Food and Beverage	9000	3	5	33	M
20	Marketing Manager	Telecom	10	1	1	24	M
21	Marketing and Merchandising Director	Print Media	16,000	10	10	44	F
22	Senior Brand Manager	Book Publisher	6000	2	6	34	F
23	Marketing Director	Computer Software	20	1	1	28	M
24	Vice President of Marketing	Aeronautics	2000	1	22	59	M
25	Product Manager	Medical Devices	66,000	1	3	26	F
26	Marketing Program Manager	Logistics Brokerage	3120	3	2	27	F
27	Marketing Specialist	Logistics Brokerage	3120	1	1	28	M
28	Market Analyst	Transportation	47,000	1	1	34	M
29	Senior Director of Marketing	Business Services	60,000	3	8	48	F

To provide maximal rigor in our analysis, we followed the prescribed guidelines for qualitative examinations (Lincoln & Guba, 1985; Silverman & Marvasti, 2008) that have been utilized in marketing applications (e.g., Friend & Malshe, 2016; Johnson & Sohi, 2016; Malshe & Sohi, 2009b). First, to ensure comprehensive data treatment (i.e., assurance data were examined thoroughly prior to drawing conclusions), we used the qualitative coding software NVivo 10 to methodically structure our data, enabling maximal analytic ability. In NVivo 10, all verbatim interview transcripts are first uploaded to the program. Subsequently, initial codes are entered into the software where they occur in each participant transcription. These quotations are then aggregated using a tree-node structure in NVivo, permitting access to quotations across different respondents in a manner conducive to qualitative analysis. This structuring also allows for thorough and holistic data inspection by considering multiple cases simultaneously. NVivo is commonly used in B2B research (e.g., Friend & Johnson, 2014; Liu, Kasturiratne, & Moizer, 2012; Raddats & Easingwood, 2010; Terho, Haas, Eggert, & Ulaga, 2012) and “is a widely accepted analysis tool for qualitative research” (Hogan, Soutar, McColl-Kennedy, & Sweeney, 2011, p. 1266).

Second, to ensure refutability (i.e., directed search for insights that contest assumed relationships) we analyzed findings for consistency across multiple contexts, such as industry and company size. To this end, we identified any factors that might result in differential outcomes on themes or patterns in the data (firm size, respondent age, industry; Silverman & Marvasti, 2008). As an example, we compared the findings from respondents in small firms with those in large firms. Our examinations revealed consistent patterns across data contexts.

We sought to further ascribe validity to our findings by member checking and peer debriefing. Member checking involves “taking data and interpretations back to the participants in the study so that they can confirm the credibility of the information” (Creswell & Miller, 2000, p. 127). Accordingly, we provided our examination results to several participants and asked for their appraisal of our interpretations and findings. In peer debriefing, we solicited an external subject matter expert to critically review the project and scrutinize the investigation's

methods and findings (Creswell & Miller, 2000). Consistent with recommendations to involve the peer debriefer throughout the entire research process, we obtained the support of a leading qualitative researcher in the SMI domain. The expert provided important feedback on our interview questions prior to our interviews as well as on our analysis and findings post data collection.

#### 4. Findings

Our findings provide myriad insights related to the important topic of SMSCs. While participants affirmed some concepts already established in the literature, new findings also emerged. Consistent with other qualitative work in marketing (e.g., Tuli et al., 2007), we focus our findings on the new insights advanced from our examination. We organize these insights based on participant focus on how the temporary nature of SMSCs impacts relevant activities (i.e., SMSC preparation and follow-up), on factors that enhance the effectiveness of SMSCs (i.e., product, marketing, and customer facilitators), and on outcomes of SMSCs (i.e., positive and negative role-based outcomes) (see Table 3).

##### 4.1. How the temporary nature of SMSCs impacts activities

SMSCs are transitory in nature, representing more temporary selling teams that respond to fluid sales opportunities in contrast to core selling teams that are rather fixed. Thus, established norms, roles, and activities inherent to core selling team routines are ad hoc within SMSCs. As such, greater a priori and post-hoc delineation of roles and activities in SMSCs is needed to ensure that both salespeople and marketers understand appropriate protocols. Given the ambiguity possible in the temporary nature of SMSCs and the limited window to capitalize on an account-based opportunity, salespeople and marketers need to be explicit in how they prepare for and follow up the joint sales calls.

##### 4.1.1. SMSC preparation

Prior to the SMSC's interaction with the customer, it is important

**Table 3**  
Initial codes, first- and second-order categories, and additional exemplar quotations.

Initial codes	First-order categories	Second-order themes	Additional exemplar quotation
<ul style="list-style-type: none"> <li>• Does their homework prior</li> <li>• Asks salesperson questions</li> <li>• Prepares and organizes</li> <li>• Customizes presentations</li> <li>• Set the agenda</li> <li>• Provide individual-level information about customers</li> <li>• Customer-centric communication</li> <li>• Agree upon desired outcome of the meeting</li> <li>• Set goals and objectives</li> <li>• Define each other's roles in the meeting</li> <li>• Discuss any potential issues that may arise</li> <li>• Discuss how the meeting went</li> <li>• Understand each other's take on the meeting</li> <li>• Share lessons learned/debriefing</li> <li>• Discuss potential ways to improve moving forward</li> <li>• Clarify action items moving forward</li> <li>• Assign accountability for following up and timeline to deliver</li> </ul>	Marketing Preparation	Temporary Nature of SMSCs	I would say finding out what type of customer this is. Is it one of the- Is it a large customer, medium, small? How much business do they do with us? How engaged are they with us? Do they only buy from us? Do they buy from others? What point of the sales process are they in currently? Are you trying to close the sale? Did you just close the sale? Is it just beginning? How long have you had a relationship with this customer? Is there anyone new at the customer site that you're working with? I think it may seem like a lot of things that you talk about before, but I feel like the more that marketing person knows, the better off they'll be, especially if that marketing person is bringing up some of those key points. It shows that the sales rep and the marketing person did their homework together. I think it ultimately impresses the customer and makes the customer feel important that not only is this marketing person either visiting or on a call, but they know about me as a customer. I think sometimes that helps the customer feel important, which ultimately you want every customer to feel important and want that one-on-one interaction and relationship. (Case 25)
<ul style="list-style-type: none"> <li>• Depends on the complexity of the offering</li> <li>• New type of difficult technology</li> <li>• Unnecessary for commodity-type product</li> <li>• Needed for value-add vs. low price product</li> <li>• Marketing brings the wow factor</li> <li>• Marketers are the heavy hitters in the presentation</li> <li>• Marketing can enable customers and salespeople to look like rock stars</li> <li>• Marketers handle the data-part of the presentation</li> <li>• Marketing's job to create the story</li> <li>• Large sized, high-level</li> <li>• Not a no-name brand</li> <li>• Customer complaining about issues</li> <li>• Customer business aptitude; smart, savvy customer</li> </ul>	Product Facilitators	SMSC Facilitators	Another one is if you've got a highly technical sale, I think it's really hard to be responsive from a content perspective, if you don't understand the product and the complexity of how it's sold. For example, right now I work sometimes with medical clients and medical sale, there are certain things that have to happen, like you have to be able to support clinical evidence. You have to have specific knowledge. I think that would be really valuable for marketing purposes to have exposure to that. (Case 29)
<ul style="list-style-type: none"> <li>• Marketing brings the wow factor</li> <li>• Marketers are the heavy hitters in the presentation</li> <li>• Marketing can enable customers and salespeople to look like rock stars</li> <li>• Marketers handle the data-part of the presentation</li> <li>• Marketing's job to create the story</li> <li>• Large sized, high-level</li> <li>• Not a no-name brand</li> <li>• Customer complaining about issues</li> <li>• Customer business aptitude; smart, savvy customer</li> </ul>	Marketing Facilitators		
<ul style="list-style-type: none"> <li>• Make customers feel extra special</li> <li>• Marketing as a lifeline for sales for difficult or technical questions</li> <li>• Marketing can help build bridge between the salesperson and customer</li> <li>• Makes job easier</li> <li>• Marketing provides another level of analytical ability</li> <li>• Marketing gives sales a broader perspective</li> </ul>	Salesperson Benefits of SMSC	Positive Outcomes of SMSC	It shouldn't be the sales guy dominating the back and forth. The marketing person should be actively involved and engaged in that conversation. Asking maybe similar but maybe different questions to understand and start making connections beyond that particular client. One of the things that I've seen and learned from sales and being in sales is they're pretty singularly focused on their client. You get responses like, "Well my client doesn't want that." Marketing has to be able to have the perspective, the knowledge and the interaction to say, "You know what? I know your client doesn't, but 10 other clients do and here's what they're talking about. Here's the message and the way that we're going to position here. Here's what we're going to do differently. Maybe it doesn't apply to you client or maybe we need to sit down and figure out how it does apply to your client." (Case 5)
<ul style="list-style-type: none"> <li>• Marketing sees the real world</li> <li>• Marketing can better understand customers at multiple levels</li> <li>• Marketing gets a reality check</li> <li>• Marketing views things differently subsequently</li> <li>• Marketing can improve marketing strategies</li> <li>• Gets marketing out of their silo</li> <li>• Data overload</li> <li>• Conflicting or repetitive messaging</li> <li>• Is repetitive for the customer</li> <li>• Loss of comfort/unnatural interactions</li> </ul>	Marketer Benefits of SMSC		
<ul style="list-style-type: none"> <li>• Information is not relevant</li> <li>• Too little details are exchanged</li> <li>• Consumes time</li> <li>• May overgeneralize what they learn</li> <li>• Sales and marketing disagree on something</li> <li>• Opposing recommendations to the customer</li> <li>• Marketing countermands sales</li> <li>• Customers can circumvent the system around salespeople</li> </ul>	Customer Drawbacks of SMSC	Negative Outcomes of SMSC	The biggest thing is that a lot of customers don't like to have managers or anyone but the sales rep because it takes more time and a lot of times the sales rep will try to do things a little bit differently just to make sure they're on top of their game in front of somebody. I would say that would be the greatest drawback, is just having someone with you, never puts you in the raw environment that you're generally in when you're out by yourself in front of the customers. Customer always acts different when someone else is with you. (Case 14)
	Marketer Drawbacks of SMSC		
	Salesperson Drawbacks of SMSC		



that both sales and marketing teams lay the groundwork for a successful sales call. When marketing does their homework prior to the interaction, success can follow. As Megan (Marketing Manager – Book Publisher) notes, customers have unique attributes, and marketing should learn as much as possible about prospective customers. This preparation helps to facilitate a successful SMSC prospect meeting, while last-minute arrangements may lead to complications.

The one thing that makes sure everything goes well is just (for marketing) to be prepared and be organized. There's different theories to why things work and why things don't, but I think it depends on each interaction, especially in our market. I think when things go really well, it's because it's been prepared for a long time. When things don't go very well, a quick situation, they're less organized. (Case 15).

Prior to the SMSC call, marketers can prepare, organize, and customize sales presentations. Having high-quality data and presentation materials available can profoundly impact the sales opportunity. As Jacqueline (Marketing Program Manager – Logistics Brokerage) suggests, when marketing dedicates sufficient time prior to the SMSC call to both run the data and design it for presentation in an interesting manner, customers are “blown away.”

When we're able to really dedicate some time and resources from our graphics designers, to create a customized presentation for that customer, that's when they're blown away. That usually takes a little bit more time, and that takes a lot of my brain figuring out how to display data in an interesting way. Taking data that's boring, and in an Excel spread sheet, and turning it into something really cool to look at, which sounds so simple, but is sometimes so difficult. (Case 26).

Salespeople also contribute to successful SMSC interactions through the pre-call process. Given their specific knowledge about the customer, salespeople must set the agenda for the SMSC call with marketing. As Jason (Business Director – Agricultural Products) conveys, it is critical that salespeople clearly explain the type of customer they are visiting as well as the customer's role in the overall market. Failure to do so can result in marketing making incorrect inferences regarding the overall market.

I think one thing is the type of customer that you're engaging with. We're in a lot of different markets. As you're engaging and getting people, getting marketers in front of different customers, it's very important for sales to set the, how should I say, to set up the situation in making sure, okay ... Melissa is our marketing manager who supports us now. “Okay, Melissa, we're going to go talk to this customer. Here's the markets they compete in. These markets, are they important to us? Are they not important to us?” These are a driver and letting them know is this a customer that really drives and impacts the market and how do they do it. (Case 17).

Salespeople can also provide marketers with individual-level information about the customer. As Roger (Market Analyst – Transportation) notes, obtaining knowledge about the members of the customer's buying center can allow marketing to better understand both the decision makers and the type of information they are looking for. By understanding the formal and informal roles in the buying center along with individual preferences, marketing can precisely customize a presentation in order to capture stakeholder support during the sales call.

I think, first you've got to understand some of the dynamics of the customer themselves. The salesperson is likely going to have some insight into what the customer dynamics are beyond just who they are, what their size is, what their business is, and all that stuff. It's getting into the particulars about relationships, about who in the business does what and who's the decision maker, and what types of

communication are effective with one person versus another. That kind of customer-centric communication is important and then talking about strategy.

(Case 28).

Both marketing and sales are jointly responsible for defining each other's roles in the meeting. Prior to the SMSC call, marketers and salespeople should establish clear role divisions and explicitly delineate what will transpire during the call. As Rafael (Director of Product Development – Financial Services) suggests, failure to define roles for this type of temporary team can cause conflict and disrupt the salesperson, ultimately resulting in marketing derailing the progression towards closing the sale.

If the marketing person is expected to participate, they should be up to speed on whatever that's going to be... I think just knowing what the roles are going into that meeting so you don't have somebody just talking out their ass. As a salesperson, the worst thing in the world is to bring people into it and have them derail the path to a close. It drives you crazy.

(Case 2).

Beyond establishing clear role divisions, sales and marketing must also agree upon desired outcomes of the meeting and set goals and objectives prior to the SMSC call. Marketing and sales may possess different and/or competing goals before making a joint sales call with a customer. If they fail to discuss and agree on their specific aims, the meeting may lack structure and fail to address the needs of each party. As Joshua (Senior Vice President of Strategy and Development – Business Services) notes, failure to have a discussion on the goals and objectives of the SMSC call before the sales call is a “huge mistake.”

Certainly the ultimate desired outcome of the meeting. If there's not a conversation of what are we trying to achieve in this meeting and how are we going to achieve that, that's a huge mistake. I think we got to do that. Obviously the ultimate agreement on the goals and objectives of the meeting and then how they're going to jointly get there is critical to having a successful meeting between the two functions.

(Case 5).

#### 4.1.2. SMSC follow-up

In addition to the criticality of effective (marketing, sales, joint) preparation, participants also note the value of joint follow-up in order to maximize the effectiveness of SMSC calls. Marketing and sales may possess different perspectives during the SMSC customer meeting. Accordingly, their takeaways from the interaction may not align. As such, it is critical that the parties engage in joint sensemaking (i.e., discuss how the meeting went, understand each other's take on the meeting, share lessons learned) to establish that the same message was received. As Roger (Market Analyst – Transportation) describes, marketing and sales discuss the call afterwards to “sync up” on the meaning derived from the customer encounter. He discusses how marketing and sales can jointly augment each other's understanding by discussing key points that the other party may have missed.

Well, I think there's definitely an opportunity to talk about an assessment of how it went, of what did you hear. What did I hear? Does that sync up? There's a lot of emotional intelligence stuff that kind of goes on and I think when you're talking directly with a customer, not everybody's going to pick up on the same cues and clues and whatever else, so I think it's valuable to kind of be able to discuss what was observed and what was picked up, and maybe what lessons were learned for how to do things differently for the next time.

(Case 28).

Furthermore, subsequent to the joint SMSC call, there may be

follow-up activities both internally (i.e., follow-up within the selling firm) and externally (i.e., follow-up with the customer). Customers have high expectations regarding responsiveness from selling firms, and it is important that the requests they made during the SMSC call are addressed in a timely manner. There may be ambiguity regarding which team member should respond to various issues and consequently, it is important to clarify action items moving forward and assign accountability for following up and timeline to deliver. As Ariel (Marketing Manager – Healthcare) states, clear direction regarding “who is taking what” on each opportunity is crucial to meeting the customer's needs. She further notes that summarizing individual responsibilities in writing prevents ambiguities between sales and marketing.

Usually in the car ride coming away from there, making sure we were on the same page, making sure we're clear on the action items. Who's taking what? To go and follow up if there's anything we need to get back to the customer with or making sure something is getting worked on, that everything is addressed and getting taken care of. Usually, that's going to be summarized in an email afterwards.

(Case 13).

#### 4.2. Factors that enhance the effectiveness of SMSCs

With the understanding that SMSCs are not ubiquitously positive, it is important to understand which factors impact their effectiveness. While several facilitators of team selling have been advanced in the literature (see Jones et al., 2005), our participants note novel elements spanning across product marketing and customer characteristics that influence SMSC effectiveness.

##### 4.2.1. Product facilitators

An important product consideration is the complexity of the offering. When the offering is simple and straightforward, SMSCs are less impactful. In these fluid instances, the salesperson is better able to address and respond to any customer queries and thus, marketing was not needed. However, when complexity was high, the salesperson benefits from bringing marketing into the sales call via an SMSC to address complicated questions. Steven (Senior Director of Integrated Marketing – Broadcasting) reiterates this assessment, stating that SMSCs are less necessary for basic sales but are more important when the deal is complex.

Really it depends on the complexity. In the media industry it depends on the complexity of the program. If the sales person is comfortable explaining it themselves and going through the deck, or whatever, it's fine. Sometimes they may ask representatives from our end come for additional support if the customer has questions that may not be able to answer. It depends on the complexity of the program that's being pitched to the client. If it's a relatively straightforward media deal and there's generally no reason to have people from marketing there. A lot of deals are like that and that's fine. I think the greater of the complexity of the product being pitched, the more necessary it is for marketing to be represented.

(Case 6).

Additionally, respondents note that SMSCs are more effective when the product being sold is a differentiated product rather than a commodity-type product. When the product is a commodity, the exchange is less nuanced and price is a key factor in acquiring the customer. However, the more differentiated an offering, the more valuable SMSCs become. As Claus (Director of Sales and Marketing – Building Materials) notes, more value-added products require better explication of the value proposition. In these instances, SMSCs are likely to reap benefits.

All sales processes are different depending on what's being sold and who is doing the buying. I think it may get a bit confusing at a commodity product level to involve the marketing in that because it

is pretty much an exchange price and they're somewhat fixed within the market. It's just an exchange. That doesn't mean the marketing may not come on the backside to help with all the other things, but on the sales call itself, usually in a commodity, lower price, low-cost budget kind of situation business model, it may not be needed. As you move up into something with more value add, a more important value proposition that needs communication, I think in a situation like that, it would become more valuable.

(Case 8).

##### 4.2.2. Marketing facilitators

Participants suggest that marketing can have a significantly positive impact on the joint sales call in SMSC interactions. Marketing can bring knowledge and skill sets to the table of value within customer interactions. By actively involving marketers in SMSC interactions, salespeople can leverage diverse insights and better meet customer needs. As Jillian (Senior Brand Manager – Book Publisher) states, marketing can serve as the heavy hitters in the presentation by providing greater content and bringing the wow factor. She notes that the excellent presentation that can result from marketing's participation is especially significant for critical calls.

They (sales) need to bring in marketing because they don't have the content knowledge. They'll say, “This person's really interested in the product. Can you do a demo for them?” for example, because they aren't really able to demo it... They (sales) bring in the heavy hitters when they have to do a big presentation. Your marketing manager is the person who you bring in if you want to do a really excellent presentation, you really want to wow them.

(Case 22).

Matthew (Marketing Director – Computer Software) shares a similar perspective on how marketing can actively provide the customer with value above and beyond what can be given solely by the salesperson. In the following example, Matthew indicates that marketing supplied the data-part of the presentation that he did not possess, thus allowing him to look like a rock star. Both Jillian and Matthew illustrate that marketing personnel possess different knowledge and skill sets than salespeople that can be leveraged to maximize specific customer encounters.

We had a prospect who was going to be speaking at a retail trade show, a retail trade conference. We have been trying to close this account for a while. She was interested in data for her speech because she was giving a speech, and we thought that it was a great opportunity to get our name out there and also help make her look like a rock star by giving her some data she wouldn't already have to use in her speech. And so, we went through and had a call and got to understand what she was trying to do, what specific information she was interested in, and then what the deliverables would look like. And then, we really handed it off and the marketing side dealt with this prospect for the next week and a half to build out that content and get her prepared for what she was doing at that conference.

(Case 23).

##### 4.2.3. Customer facilitators

Our participants also identify specific customer factors that increase SMSC effectiveness. Customer size is an element that impacts SMSC value. Specifically, the impact of SMSCs is higher for large sized, high-level customers. Marketing managers note that their time is scarce and that would prefer to concentrate their SMSC time on larger customers. Further, strategic customers offer a higher return on the investments necessary to utilize SMSCs, both at the firm- and individual-level. As Ella (Marketing Manager – Entertainment) notes, no-name brand customers often have lower budgets and therefore do not warrant an SMSC. However, for established brand customers, SMSCs provide value and are appropriate.

It's a bandwidth thing. I mean, I can't go to every single client meeting and have these high level, strategic conversations; at some point the seller needs to be doing that. So I think the bandwidth thing is a certain factor. You know, I'm not just going to go to like Mama Shea Butter client meeting, no-name brand. If the spend is not there, it's not worthwhile on my time spent because I could be making materials that are scalable for the entire organization. You know, versus one meeting that requires me to travel, that requires me to create custom materials for. So I think that, you know, if they're having Coca-Cola, Procter & Gamble, those are very important meetings, building those relationships are important, but not a no-name brand or budget, you know a client that doesn't spend very much, and doesn't have the potential to spend very much.

(Case 1).

Additionally, SMSCs can effectively deal with agitated customers who complain about issues. When a customer has experienced issues with a seller's products and services, including marketing in the sales call can send a positive signal. As Janet (Product Manager – Medical Devices) suggests, having marketing and sales personnel jointly visit the customer as an SMSC shows their commitment to identifying and assisting with the customer's priorities. However, when the customer's business is steady, Janet warns that including a marketer may actually cause more harm than good.

Also if there's maybe an issue with the product, so complaints are coming in and they're having a lot of issues, sometimes doing a visit like that especially if there's a risk of leaving as a customer, I think it's important to have the marketing person and salesperson go in together to show they're trying to figure out what is going with the product and they're trying to fix whatever it is. Sometimes I think if everything is running really smoothly with the customer, and there's no hiccups, they consistently order, that type of thing. Sometimes I think it hurts to have more people come in to that. I think it's important that sales rep visits them and things like that, but if they're a steady customer, and there's no complaints and it's just a quick call to say, "Yup, I want to place an order for this again or whatever that looks like," sometimes I feel like if you do bring another person into it, it can really disrupt the current relationship. Especially if it's just smooth sailing, bringing a marketing person in there is not always appropriate. If it's not broken, don't fix it. Just let it keep going how it's going.

(Case 25).

Lastly, participants note that not all customers possess equivalent amounts relevant knowledge, and that SMSC engagement with customers with high business aptitude (i.e., smart, savvy customers) yields greater benefits. When marketing staff meets with customers who are knowledgeable, the data that the SMSC provides is more valued and the customer can get answers to more nuanced questions. Franko (Sales and Marketing Leader – Agricultural Products) conveys that savvy customers are a more fruitful target for SMSCs.

The sharper the customer, as far as level of business intelligence, the greater the return on a joint call. The greater the aptitude of your customer from a business and financial perspective, the more they're usually asking for from your team. By having your sales and marketing team there, your marketing team would usually have a lot of data about what trends were going on within the market. To me, that's when it was of the highest value, when you have a very apt customer that was going to ask a lot of questions around the business.

(Case 7).

### 4.3. Outcomes of SMSCs

#### 4.3.1. Positive outcomes of SMSCs

As our review of the literature indicates, scholars have pinpointed

some positive outcomes of team selling at the firm level and with regard to the customer and selling firm. Previously espoused advantages for firms using selling teams include enhanced coordination, increased customer lifetime value, and higher sales volume and profitability (Arnett et al., 2005; Bradford et al., 2012; Sleep et al., 2015). Similarly, the customer can accrue benefits such as improved business solutions, greater knowledge of company deliverables, better inter-firm relationships, and more accurate decisions (Arnett & Badrinarayanan, 2005; Mengüç et al., 2013). Our participants iterate many of these key benefits in their discussions of SMSCs. Notably, our participants also convey that given the temporary nature of SMSCs, marketers and salespeople may individually derive key benefits. These insights indicate that literature has largely overlooked individual-level positive outcomes for marketers and salespeople working in SMSCs.

SMSCs can bring multiple benefits for salespeople. Including marketers on sales calls can help salespeople make their customers feel extra special and they tend to appreciate this gesture. Barbara (Executive Marketing Director – Pharmaceuticals) describes how bringing marketing on her sales call can help her score points with her customers.

If you have a customer that likes to hear from someone from the home office, you can leverage that relationship as, hey I'm going to have someone from the marketing team with me next week, any questions you have for them or anything you need to know, they'll be with me next time I'm in or whatever. (Some customers) like to feel extra special that somebody is visiting them from the home office or if they have specific questions on the brand or different things like that. That's when I think it can be a huge benefit that, hey someone from our brand team is actually going to see you and talk to you. You're going to get an opportunity to meet with them and that's going to be the thing that you want. I think that, for certain customers that really enjoy that, it makes them feel extra special. That can be a huge benefit.

(Case 14).

Salespeople may also benefit from the way that marketing personnel can serve as a lifeline for difficult or technical questions. Customers expect salespeople to be experts on the products they sell and may respond adversely to a salesperson's unfamiliarity with product specifications or subject matter expertise. As product experts, marketing can provide information on the spot and bridge the salesperson's potentially embarrassing knowledge gaps. Edward (General Manager – Printing) articulates how SMSCs can benefit the salesperson in this manner.

The benefit to the sales rep is that if they're in a call where the customer is really doing a deep dive on technical information or they have a lot of details about a product that maybe a sales rep wouldn't have a complete grasp of, it's good to have the marketing guy there. In this case, the product manager is supposed to know everything about the products.

(Case 4).

Our participants also note that SMSCs can particularly benefit new salespeople. Marketing can help build a bridge between the salesperson and customer to facilitate an early relationship. As Ariel (Marketing Manager – Healthcare) relates, a marketer who has an established relationship with a customer can help build the interpersonal connection and context to the business relationship when present. Consequently, SMSCs can help new salespeople strengthen customer relationships in a more expeditious manner.

If the marketing person has been around longer than the salesperson and the marketer has established a relationship with the customer, for whatever reason, maybe they worked closely with them at a show or were helping them marketing that technology, we have more of that relationship. If you have a new rep coming in, they may often pull on (marketing) to build that bridge as they're coming on

board to get them a little more acquainted with a customer and things like that.

(Case 13).

Marketers can also benefit from participation in SMSCs. Participants note that the most pervasive benefit for marketing personnel is their ability to see the real world of their products and customers. Marketing can at times grow disconnected from products after strategy creation and before implementation as this personnel often operates in a vacuum, sheltered from the realities of the marketplace. SMSCs are a means for marketers to acquire a more direct customer perspective. Joshua (Senior Vice President of Strategy and Development – Business Services) notes that there are many intricacies to understanding customers, including the personal factors that make them tick. SMSC involvement exposes marketers to these considerations and helps them to better conceptualize their customers.

A big component of marketing is understanding the customer, the buyer, the persona, the rationale, the impetuous, the motivation, if you will. There's so much value in being in front of customers, seeing that, interacting with it, and being part of those presentations. There's no better way to learn than being in front of the customer.

(Case 5).

Thus, despite the benefits that SMSC involvement offers to salespeople, Edward (General Manager – Printing) believes it is most valuable to marketers. Edward values the perspective marketers gain when they are in the field with salespeople and customers, and how SMSCs can connect marketers to concrete customer concerns and gain a different view (e.g. get a reality check).

Honestly, there's more benefits I believe that accrues to the marketing person, whether that be your product manager or marketing manager, or someone in charge of doing critical markets, whatever. In my experience, no matter how long I was in the industry or the company, every time I went out in the field I saw something a little bit differently than what I believed. It was always that reality check. More benefits, I think, accrue to the marketing people going out with the salesperson as opposed to the other way around.

(Case 4).

#### 4.3.2. Negative outcomes of SMSCs

In addition to discussing the positive outcomes of SMSCs, our participants revealed that customers, marketers, and salespeople may each encounter significant pitfalls as a result of SMSC engagement. However, the literature has not examined how SMSCs may backfire, particularly at the role-based level. An in-depth assessment of such negative outcomes is therefore highly relevant to fully understanding the optimization of SMSCs.

First, one of the key benefits for customers interacting with an SMSC is the increased information and access to greater technical knowledge that multiple roles may possess. However, this opportunity can also be a detriment, as customers may suffer from data overload. Marketing and sales may both have information they wish to convey to the customer that may be overwhelming and confuse the customer. Roger (Market Analyst – Transportation) relays how SMSCs can challenge customers.

One thing that I could see would be information or data overload for the customer, where you've got two folks that are there that both want to share kind of their story and information and detail and stuff like that you might kind of get some overload there... I mean the downside that I could see if you bring two folks together and you're not coordinated at best, then you potentially have a conflict of messaging or too much messaging and overload on the customer side.

(Case 28).

Roger goes on to note that beyond information overload, SMSCs pose the risk that the information may become repetitive for the

customer. If a salesperson and customer have worked together for a long period of time, they may have already discussed the issues and answered the questions marketing wants to address. Repetitive messaging can aggravate the customer and waste time by repeating discussions that have already taken place.

Potentially if you've got a customer that you've been working at for twenty years and they know and understand your business intimately just as you do theirs, then potentially I could see there being some downside to trying to go in (with marketing) and say "Hey. Let us both in." There could potentially be some downside there where the customer is like "Dude, I already know this. What are you trying to do?"

(Case 28).

SMSCs may also bring particular detriments to marketers. While some interactions may be highly germane to marketers, others may provide information that is not relevant. When marketing personnel accompanies sales' staff, they are present for other meetings salespeople must attend in addition to strategic meetings. As Edward (General Manager – Printing) conveys, some of these meetings may deal with issues outside the marketer's product line or market, thus consuming time and not providing informational value to the marketer.

It's highly unlikely that the entire day, two days, or three days will be full of calls that would specifically apply to the tag-along person. In those cases, the marketing person will have a certain amount of their time that's somewhat wasted because they might be going on calls that have nothing to do with their product line area or their market.

(Case 4).

SMSCs may also contribute to the risk that marketers overgeneralize what they learn from customer interactions. Marketers may be excited by positive customer responses to marketing deliverables. However, this response may cause marketers to exaggerate the utility of their programs and assume that their successful SMSC experience will be generalizable to the broader customer base. Samuel (Marketing Manager – Food and Beverage) illustrates this logic, noting that SMSCs can cause marketers to adopt a one-size-fits-all mentality.

In some instances if a marketing person goes out and spends a day with their rep and they're super successful, they also tend to generalize that every customer in the market is the same as the customers they saw that day. "This worked with everybody. We had a really great day. This should be a catchall for everybody. I don't understand why this doesn't work for everybody," kind of thing.

(Case 19).

Furthermore, salespeople may also fail to benefit from SMSCs. Involving marketing in sales calls can spark some potentially negative interactions. Specifically, if sales and marketing disagree on something, provide opposing recommendations to the customer, or if marketing countermands sales' authority, the salesperson stands to lose face with the customer. In many organizations, the salesperson is ultimately responsible for the success of a customer account long after the SMSC dissolves. In cases where marketing participates on a joint call and refutes what the salesperson conveys, the salesperson's accumulated trust with the customer is weakened and the relationship jeopardized. As Janet (Product Manager – Medical Devices) iterates, it is important that marketing presents a unified front with sales to avoid diminishing the long-term customer relationship.

Sometimes the marketing person and the sales rep disagree on something. If the marketing person is recommending a totally different product than the sales rep, you're kind of discounting all the work that the sales rep had already done with that customer. I feel like there's a very fine line. I think a lot of conversations need to be had prior to the marketing person going on a customer visit or a

customer call with the sales rep, so even if the marketing person ends up disagreeing with what the sales rep had originally offered to the customer, that they do it after the fact and not during.

(Case 25).

Additionally, salespeople run a risk that customers will circumvent the system around salespeople when marketing personnel are involved. The focal part of sales' value to the organization is spanning the boundary between their firm and the customer. However, in an SMSC, the customer and marketer may exchange contact information and engage in their own independent dialogue. As Edward (General Manager – Printing) suggests, this presents the risk that the customer may bypass the salesperson on key issues.

There is a danger in having someone from (marketing) come out with the salesperson and customer, and them getting that person's business card because now they think they've got somebody at the home office that they can go to all the time and get answers to all sorts of different questions, going over the salesperson or trying to circumvent the system. There's a little bit of that danger that makes them always cautious.

(Case 4).

## 5. Discussion

This study advances understanding of the processes, facilitators, and varied outcomes of SMSCs across functional roles. In this effort, we identify four dimensions associated with the temporary nature of SMSCs (marketing preparation, salesperson preparation, joint preparation, joint follow-up); three categories of SMSC facilitators (product, marketing, and customer facilitators); and detail positive outcomes (salesperson and marketer benefits) as well as negative outcomes (customer, marketer, and salesperson drawbacks) that span the interfacing roles of SMSCs. Collectively, this study on SMSCs responds to multiple calls to further understand the intra-team processes and the moderators of success among selling teams (e.g., [Ahearne et al., 2010](#); [Evans et al., 2012](#); [Jones et al., 2005](#); [Mengüç et al., 2013](#)).

### 5.1. Theoretical implications

By providing an in-depth understanding of SMSCs, we meaningfully integrate knowledge inherent to SMIs with the broader team selling context. This contribution is noteworthy due to the focus shifting away from individual sales efforts and towards team selling in both practice ([Cummings, 2007](#)) and academics ([Brown et al., 2005](#)). By investigating SMSCs, myriad insights specific to the temporary nature of such selling teams are uncovered and particularly relevant to the increasingly common practice of matching sales and marketing efforts to account-based opportunities. While SMSCs represent a specified type of selling team, our research could increase the effectiveness of joint sales-marketing efforts ([Johnson & Boeing, 2016](#); [Malshe, 2010](#)) as well as provide novel insights applicable to a variety of team configurations. Such a focus theoretically advances the majority of SMI research conducted in more typical situations (e.g., [Biemans et al., 2010](#); [Homburg et al., 2008](#); [Rouziès et al., 2005](#)) and also addresses key opportunities within the team selling literature. Our study results also demonstrate effective mechanisms for minimizing disconnections between sales and marketing (e.g., [Malshe & Sohi, 2009a](#); [Massey & Dawes, 2007b](#)) within this interface configuration, and provides strategies to foster coordination between these two interdependent functions (e.g., [Kotler et al., 2006](#); [Malshe & Sohi, 2009b](#)).

Our focus on SMSCs also expands the current body of knowledge where scant prior research had examined (a) selling teams consisting specifically of sales and marketing personnel, and (b) selling teams that work together on a more opportunity-oriented basis (i.e., selling centers). These shortcomings have been problematic given the struggles

that sales and marketing teams face in balancing divergent directives (e.g., functional distinctiveness vs. coordinated efforts, internally-focused activities vs. externally-focused activities; [Le Meunier-FitzHugh & Piercy, 2011](#); [Sleep et al., 2015](#)), and the oft malleable structure of selling teams assembled to mirror the fluidity of buying centers and respond to the specific needs of a sales opportunity. With these implications in mind, our findings respond to a series of research questions to offer an empirical depiction of SMSCs and a nuanced illustration of the various facilitators and outcomes across interfacing and customer-facing roles.

To better understand the temporary nature of SMSCs as well as the specific preparation and follow-up activities necessary for SMSC functioning, our research advances a conceptualization of the SMSC intra-team processes that substantially impact outcomes at both the firm and individual level. In doing so, we pinpoint why such teams might struggle to cohesively and successfully collaborate on customer-driven initiatives. Furthermore, we illuminate how salespeople and marketers individually perceive the benefits, drawbacks, and effectiveness of achieving customer-directed SMSC outcomes. Capturing the unique perspective of participants who have served both roles in SMSCs, our in-depth interviews offer a methodological contribution to the selling team literature and allow for a more complete understanding of the diverse perspectives represented within the team.

Our qualitative analysis advances existing research that has identified concepts loosely related to the themes articulated across the SMSC preparation and follow-up categories. For example, in relation to joint follow-up, [Biemans et al. \(2010\)](#) and [Malshe and Sohi \(2009b\)](#) have explicated the importance of joint sensemaking. However, in contrast to the previously espoused importance of sales' and marketing's joint sensemaking of marketplace information in the marketing strategy process, our findings highlight specific post-call action items that SMSCs must achieve to better understand specific customers. While failures within the broader application of joint sensemaking may impact strategy creation, our findings show that weak intra-team dynamics and customer interactions may follow the absence of joint follow-up and the presence of divergent SMSC understandings. Thus, while joint follow-up in SMSCs increases the likelihood of aligned efforts between sales and marketing, a lack of follow-up could harm the salesperson-customer relationship or the salesperson-marketer relationship due to conflict spurred by missed opportunities. The critical importance of joint sensemaking within SMSCs may result, in part, from the temporary nature of such relationships, underscoring how debriefing contributes to selling centers' effectiveness. This finding could extend to other team selling configurations as well (e.g., inside sales temporarily working with outside sales, salespeople working with operations), given that the need to discuss and clarify action items should be equally critical in all temporary intra-firm selling centers.

The literature has made repeated calls to better understand intra-team processes, which capture the factors leading to and moderating successful team selling (e.g., [Ahearne et al., 2010](#); [Evans et al., 2012](#); [Jones et al., 2005](#); [Mengüç et al., 2013](#)). Similarly, multiple scholars have called for in-depth exploration into the levers that can strengthen sales and marketing connections (e.g., [Kotler et al., 2006](#); [Le Meunier-FitzHugh & Piercy, 2011](#); [Malshe, 2011](#)). Our research identifies product, marketing, and customer facilitators of SMSC success. These findings provide a parallel to SMI integration devices that can be applied specifically in the selling team literature. Further, the insights gained from our qualitative analysis build upon the prior research that has identified concepts related to the themes identified across the SMSC facilitator categories. For example, a multitude of authors have discussed the varied skills and capabilities necessary for an effective sales and marketing team (e.g., [Biemans & Makovec Brenčić, 2007](#); [Dothan, 2004](#); [Homburg et al., 2008](#); [Rouziès et al., 2005](#)). We extend such work by identifying marketing-related factors that facilitate effective SMSCs.

Customers tend to view selling teams comprising both marketing and sales functions positively ([Arnett et al., 2005](#)). Possibly stemming



from these positive perceptions, selling teams often result in intra-organizational benefits such as enhanced integration and greater shared knowledge (Arnett & Badrinarayanan, 2005; Deeter-Schmelz & Ramsey, 1995), as well as inter-organizational benefits such as better solutions, improved trust, and enhanced relationships (Arnett & Badrinarayanan, 2005; Mengüç et al., 2013). However, the literature has also suggested the potential for dysfunctional team selling to weaken performance (Evans et al., 2012), leading to calls for additional research into what can improve or hinder selling team performance (e.g., Deeter-Schmelz & Ramsey, 1995; Mengüç et al., 2013). We respond to these calls by identifying positive and negative outcomes of SMSCs through in-depth interview with participants who have served as both marketers and salespeople within SMSCs.

Our study further identifies several individual-level (i.e., salesperson, marketer, customer) benefits and drawbacks of SMSCs. These insights advance the team selling literature beyond a focus on team- or firm-based performance outcomes. As such, our findings detail a number of positive salesperson and marketer outcomes possible in SMSCs. Such findings may reduce individual resistance towards participating in selling teams (Perry et al., 1999) and subsequently benefit both individuals and their organizations. Our findings also pinpoint a number of negative outcomes of SMSCs that illuminate the pitfalls of selling centers. These negative outcomes also had previously gone unexamined in the team selling literature and offer a critical and balanced perspective to both academics and practitioners that includes potential detriments and benefits of team selling.

Collectively, the insights gained from our qualitative analysis advance existing research. For example, identifying that marketers can act as lifelines for salespeople extends what Malshe (2010) notes as value addition and/or business savvy. While such work highlights how marketing can support sales, our conceptualization of the marketer as a lifeline shows how marketing support can occur in a real-time, customer-facing interaction rather than being limited to an internal-facing interaction between sales and marketing. This important difference allows salespeople to save face in front of customers and prevent credibility erosion, which could not have been revealed in the extant SMI literature because of the post-call nature of its concepts. Additionally, our identified drawback of marketing countermanning sales' authority provides some similarities to existing concepts from Malshe (2009), which focused on the importance of customers not bypassing sales in the exchange. Our finding, however, is again differentiated by our focus on instances where a marketer disputes the salesperson during the sales call. While the customer would otherwise be unaware of internal divisiveness, such occurrences during the SMSC jeopardize the customer's trust in the salesperson.

Our examination also extends existing knowledge regarding the selling process in the context of individual salespeople. For example, while setting goals prior to a salesperson's sales call has been examined (Manning, Ahearne, & Reece, 2014), our findings illustrate the importance of marketers and salespeople jointly setting clear goals rather than planning being performed solely by the sales' personnel. If salespeople and marketers were to set their respective aims separately, dramatically different goals could emerge during customer interactions and result in adverse outcomes. By jointly setting goals, SMSCs can better harness the knowledge and skills of both participants to create synergy between the two. Additionally, while some marketers may view pre-call customer research as sales' responsibility, our results show that this preparation is also imperative for the marketer in order to contribute meaningful value during the sales call.

## 5.2. Managerial implications

The findings from our research have direct and actionable implications for organizations and individual employees alike. An overarching implication of this research is that SMSCs are not simply fool-proof fix-alls. Due to the existence of both clear benefits and legitimate

drawbacks, effective SMSC usage is situational. As such, we guide managers in determining which scenarios and conditions are most ideal for SMSCs and we identify some possible associated outcomes.

When evaluating the potential of SMSCs, managers should consider whether the benefits provided to marketers and/or salespeople are needed, and if the benefits will positively affect the organization's long-term performance. For example, if marketers lack perspective on product applications or customer interactions, then SMSCs can greatly expand these knowledge areas. Similarly, if there is a focus on salesperson development due to lack of experience, then SMSCs can be used to accelerate developing relationships between salespeople and their customers. However, managers should also consider potential drawbacks to the firm's employees. For example, if SMSCs are used irregularly, marketing runs the risk of generalizing insights gained from one or two customer visits and applying them to all customers.

Firms utilizing SMSCs should establish several institutionalized guidelines for how selling partners prepare and interact in order to achieve optimal success. Standards for client research and individualized marketing materials should be set. Further, norms should establish that sales will take the lead and supply marketing personnel with appropriate customer information. Salespeople should be required to define clear roles for members of the selling center and set straightforward goals for each customer interaction. The firm should also require a formal debriefing between selling center personnel and record these outcomes in a centralized database for future reference. Setting standards for these types of actions will help ensure optimal SMSC success.

We also identify several vital factors associated with product, market, and customer characteristics that enhance the effectiveness of SMSC performance and are vital aspects for management to evaluate when considering if using SMSCs is appropriate. Namely, companies should strongly consider utilizing SMSCs when product complexity is high or a high degree of differentiation is present. In these instances, SMSCs are more appropriate due to marketing's potential to add their deeper understanding of the intricacies of the products being sold during client interactions. SMSCs should also strongly be considered in dealings with larger B2B customers and when serving agitated customers. Our research should guide managers considering the utilization of SMSCs to maximize success based on more selective implementation and targeted optimization processes.

## 5.3. Limitations and future research opportunities

Due to the lack of empirical work examining SMSCs, a theories-in-use approach was most appropriate for the discovery-oriented research completed in this manuscript. While a qualitative research approach provides critical understanding when investigating phenomena that are underrepresented in the literature, it does not allow for quantitative testing of germane hypotheses. Although the use of qualitative methods is not a limitation in itself, future research opportunities could build on our findings. As an example, additional scholarship could utilize quantitative methods to collect customers' attitudinal responses (e.g., satisfaction) and/or objective performance metrics (e.g., purchase data for an SMSC versus salesperson only interactions). Such approaches would begin to objectively assess whether the benefits of SMSCs outweigh the costs. Another potential study could convert findings from the current study, such as facilitators, into measurable constructs used to empirically determine how various moderators impact the effectiveness of utilizing SMSCs on either sales or customer satisfaction outcomes. A nuanced study could explore both how factors contribute to the formation of SMSCs and how different elements moderate the effectiveness of SMSCs on customer performance.

Additionally, while a major strength of our sample participants' perspectives is their dual sales and marketing experiences within SMSCs, limitations to our sample should be noted. While the average sales experience of our respondents was over four years, average

marketing experience was over five years, and average total experience was over nine years, several respondents had relatively brief stints in either their sales or marketing roles, which thus limits their ability to fully see both perspectives. While all respondents indicated sufficient experience and knowledge in SMSCs, additional insight that is more specific to the sales or marketing roles could be a fruitful direction for subsequent research. For example, researchers could collect data from salesperson–marketer dyads and compare the findings to those advanced in our examination. Additionally, collecting multilevel-multi-source quantitative data either within SMSCs or across organizational boundaries (e.g., SMSC members and customer participants) might be beneficial. More specifically, future endeavors could include exploring nested relationships within organizations at various hierarchical levels, as well as relationships between customers and SMSC members in order to further investigate customer-level outcomes.

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