



# Social media and related technology: Drivers of change in managing the contemporary sales force

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## KEYWORDS

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**Abstract** The selling environment has undergone tremendous transformation over the past 2 decades. Perhaps the greatest change has centered on changes and advancements in technology. The latest dramatic change has been the rapidly increasing use of social media and other related technologies in the business-to-business realm. The sales world began the use of technology through the use of Web 1.0, which was primarily webpage oriented; now we see the world of social media as the paradigm of how firms should implement technology. Although there has been some recent emphasis on how marketing might implement social media into their strategies and how the individual salesperson might implement social media into his or her daily selling routine, no substantive discussion on how social media is affecting the role of the sales manager has appeared in the literature. This article systematically examines how social media is impacting the sales management function and, in fact, may be dramatically revolutionizing the position. To help the marketing and sales organization better understand the changing sales world, we present eight lessons that every sales manager needs to embrace.

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## 1. Evolving sales world

Consider the following scenario: Burt, a 52-year-old veteran, U.S.-based sales manager in a mid-sized

global B2B firm, has reached Friday night after a long and challenging week—knowing that Saturday will most likely be just another work day. He begins to recap in his mind some of the trials he's faced throughout the week. A few stand out:

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(J.M. Rudd)

- On Monday two of his salespeople came to him for resolution of a conflict about which one gets

credit for a sale that crossed geographic boundaries and was facilitated by both salespeople through social media.

- On Tuesday a Skype call with a European client, the salesperson, and himself that took place at 5 a.m. to accommodate the client became problematic due to in-and-out connectivity resulting in less than satisfactory resolution.
- On Thursday he had to have a discussion with a new salesperson that had not been making a lot of face-to-face calls, instead claiming that she could do a better job of selling and building relationships virtually through social media.
- And just this afternoon on his weekly call with the VP of Sales, he was discussing the company's newly mandated gamification platform for salesperson compensation, during which he was forced to admit to his boss that he really doesn't understand the system and how it is supposed to be used—a critical issue since his newer salespeople are all embracing and enjoying the new game-based system.

As Burt takes his first sip of Scotch, he begins to realize just how much things are changing in his world as a sales manager. And just as he begins to relax and think about his grandson's t-ball game at 9 a.m. on Saturday, he hears a ping on his smartphone, only to find that the European client from Tuesday has set up a redo of the failed virtual meeting at—of course—Saturday at 9 a.m. So now he will have to miss the t-ball game. What a week!

### 1.1. Evolution or revolution?

Ingram, LaForge, and Leigh (2002, p. 559) suggested that the sales function is in the midst of a "renaissance—a genuine rebirth and revival." Although increased changes in the sales environment are not new, the rate of change and the level of change are such that we may no longer be in just an evolving environment—rather, we may have begun more of a revolution in the sales environment that redefines all aspects of the sales job and sales management.

Younger workers on both the selling and buying side are not just accepting the new technologies, they are embracing them. As a result, they are demanding immediate and extensive adoption of the new social media and related technologies (Rapp & Panagopoulos, 2012). The balance of power has shifted from the producing organization to the consuming organization, and sales strategies are

going to have to keep pace with the revolutionary changes that are occurring.

This revolution creates many new and heretofore unanticipated challenges and opportunities for managers in sales organizations. In this article, we discuss how sales organizations can manage the use of social media and other related technologies in the daily sales job. More specifically, we provide direction regarding how sales managers like Burt must incorporate social media into the selling process and how the sales manager must then lead his or her sales personnel's use of social media. We begin with a brief discussion of social media and the resulting impact in the sales environment, focusing on defining the various tools of social media and related technologies. We then look at the effects of the salesperson's use of social media on day-to-day management of the sales force. The next part of the article systematically examines basic sales management functions and how social media is transforming the manager's daily routine and job. Finally, we conclude with implications of using social media and related technologies for the first-line sales manager as well as upper management.

## 2. Social media and related technology

Relationship marketing and relationship selling has been a driving organizational philosophy since the mid-1990s. What better way to build a relationship between organizations or between an organization and consumers than by following what had revolutionized the social fabric of the world? However, social media and related technology changed the interactions between people: the new social dimension allows one another to keep up with friends, celebrities, and the latest 'it' product. Social media has been defined a number of different ways, but one working definition is that social media is digital content and networking interactions that are developed and maintained by and between people (Cohen, 2011). In other words, social media consists of a variety of methods to disseminate information and content through interactions between individuals or organizations.

The business environment of today faces challenges that didn't exist a decade ago or have been greatly exacerbated by the revolutionary, explosive diffusion of social media and related technology. Competition has become much more intense due to competitors entering the market from nations that 10 years ago were not competing in the marketplace. In addition, the Internet has allowed small, even 1-person organizations to enter the market and

effectively compete as niche players. Individually they may not make a huge difference to an established firm's market share, but when dozens, hundreds, or even thousands of small players—also known as 'nibblers'—enter the market, the overall effect has been a significant fragmentation of market share and a significant increase in the number of competitors. The concept of mass customization or even one-to-one marketing has occurred because the customer is dictating his/her specific needs and requirements.

From the sales organizational perspective, the result of the above is that salespeople find they are no longer dictating information to the customer but rather the customer is telling the supplier *exactly* what they want with the expectation that the need will be met immediately or someone else will provide the desired requirements. The customer of the social media age is fully capable of finding needed information through the Internet and social media, resulting in a lack of need or desire to talk face-to-face with a salesperson—a development that many organizational buyers prefer, especially those of the younger generation (Marshall, Moncrief, Rudd, & Lee, 2012).

Despite strong buyer enthusiasm for social media interactions, most sales organizations have been very slow to adapt social marketing tools. However, if selling via social media occurs, it is often at the initiative of the individual salesperson, without an organizational framework or strategy (Agnihotri, Kothandaraman, Kashyap, & Singh, 2012). Social media is transforming the customer from being a passive player in the buying process to an active, and maybe controlling, participant in creating and sharing information and needs (Trainor, 2012). As a result, sales managers must learn to impact and shape customer discussions in a manner that is consistent with their organization's mission and performance goals (Mangold & Faulds, 2009).

Table 1 provides the reader with a representative set of business-focused social media studies, including the purpose, study technique, and key takeaway. By nature of the field, most of these have been published from 2012 forward.

### 2.1. Managing the social media era sales force

One of the real issues in this social media era is the changing nature of the sales force as well as the sales job. Andzulis, Panagopoulos, and Rapp (2012) argue that no matter how organizations view selling, social media is becoming evident *in every stage* of the selling process. "Every stage in the sales cycle, every tactic, and every strategic plan has the

potential to be affected by the organization's adoption of social media" (p. 311). However, it is not just the selling process that is affected. Indeed, the sales manager of today has to determine how social media is going to affect the day-to-day *management* of the sales force. Social media affects how the manager supervises, selects, trains, compensates, and deploys the sales force. In addition, social media will greatly impact salesperson performance vis-à-vis his or her role, aptitude, and motivation. These relationships are depicted in Figure 1.

Furthermore, salespeople may be using social media differently, particularly if they grew up with social media versus having to adapt to it, as might be the case for well-established salespeople (Robinson, Marshall, & Stamps, 2005). So, how do we manage the new social media salesperson? As is typical with many important managerial questions, "It depends" is the most likely answer. Sales managers in this social media generation are going to have to be familiar with the trends in social media as well as the ability of the sales force to successfully deploy various methods based on the needs of the marketplace and the needs of each individual customer. For example, will a 25-year-old salesperson use social media in the same manner as a 55-year-old, 30-year veteran? There has been very little research and virtually zero direction for managers as to how to manage the plethora of issues that are emerging as sales organizations attempt to bring the best social media tools to the daily sales job. The remainder of this article systematically tracks through the elements in Figure 1—both the aspects of sales management functions and of salesperson performance—in order to provide a series of lessons for managers and a prescriptive approach to better managing sales force use of social media and related technology. At the end we'll return to Burt's situation and reflect on how these lessons learned can help him do a better job as a sales manager.

### 3. Sales management functions

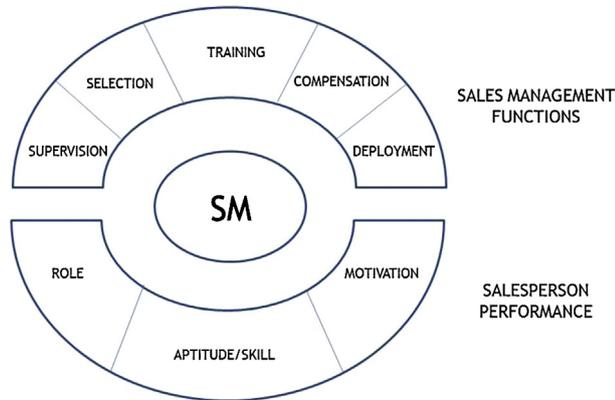
Walker, Churchill, and Ford's (1979) model is unquestionably the best known, widest used, and most researched of any sales management model over the modern sales era. We derived Figure 1 from their model, which dictated the various components that influence sales performance. Understanding the salesperson performance model in light of sales management functions is crucial, because almost every decision a manager makes can influence the elements of the model. Following the flow of Figure 1, we introduce and discuss critical managerial lessons related to social media, first on sales management functions and second on salesperson

Table 1. Social media (SM) studies

	Study	Year	Journal	Key Purpose	Study Technique	Key Takeaway
1.	Agnihotri, Kothandaraman, Kashyap, & Singh	2012	JPSSM	Social media and value creation	Development of framework	SM framework leading to value creation
2.	Andzulis, Panagopoulos, & Rapp	2012	JPSSM	Evolution of SM in sales	Theoretical presentation	SM strategies described for each step of the selling process
3.	Berthon, Pitt, Plangger, & Shapiro	2012	BH	SM for marketing strategy	Theoretical presentation	Presentation of 5 axioms for use of SM in marketing
4.	Hannah, Rohm, & Crittenden	2011	BH	Understanding SM as an organizational ecosystem	Conceptualization	5 lessons learned in the implementation of SM
5.	Kaplan & Haenlein	2010	BH	Classification of SM	Conceptualization	5 points about using SM and 5 points about how to be social
6.	Keitzmann, Hermkens, McCarthy, & Silverstre	2011	BH	Build SM framework	Conceptualization	Change in communication throughout the sales organization
7.	Levin, Hanson, & Laverie	2012	JPSSM	Examine motivation and social media	Empirical data	Apathetic motivation independent of intrinsic and extrinsic motivations
8.	Marshall, Moncrief, Rudd, & Lee	2012	JPSSM	SM in the selling environment	Focus groups	Six SM themes and sub-themes
9.	McCall & Troung	2013	JPSSM	Web-video interface	Empirical data	Facial appearance replaces many traditional dimensions of service quality
10.	Mangold & Faulds	2010	BH	New promotion tool	Conceptualization	Introduction to social media tools
11.	Rapp & Panagopoulos	2012	JPSSM	Special issue review	Issue introduction	New paradigm of how firms must interact with customers
12.	Rodriguez, Peterson, & Krishnan	2012	JPSSM	SM and sales performance	Empirical data	Model on SM and sales process and sales performance
13.	Trainor	2012	JPSSM	SM and CRM	Conceptual model	Introduction of social CRM

BH = Business Horizons; JPSSM = Journal of Personal Selling & Sales Management

**Figure 1. Impact of social media on sales management**



performance. The lessons are summarized succinctly in [Table 2](#), which provides a summary of the sales management variables, pre- and post-social media sales manager activities, and how social media is impacting the manager’s day-to-day role in leading and directing the sales force.

We will discuss the sales management functions of supervision, selection, training, compensation, and deployment as portrayed in [Figure 1](#) and summarized in [Table 2](#).

### 3.1. Lessons on supervision

The traditional pre-social media sales manager’s job was always based on his or her ability to supervise, manage, and lead a group of salespeople in a given geographically concentric district. Supervision is basically the day-to-day control of the sales force under routine operating conditions. Typically, a sales manager would spend time mentoring his or her personnel, including riding with the rep on sales calls (‘work-withs’). The supervision was most likely face-to-face through weekly meetings—if it was geographically feasible for the district personnel to meet as a unit. These meetings were designed to keep the manager’s group motivated and in tune with the district goals. Furthermore, each salesperson would typically have a weekly or monthly report that the manager and salesperson would review. The cell phone allowed the manager the ability to be in touch with the salesperson, but the calls could be returned at a much later time to accommodate bad cell phone reception or inaccessibility due to meetings and sales presentations. The cell phone and laptop improved communication between manager and salesperson, but there was still a level of independence for the salesperson because contact was not automatic.

In today’s sales world, the face-to-face meetings may be less frequent because the need is not as

critical. Technology has made non-face-to-face meetings possible through the use of Skype or other teleconferencing capabilities. Just a few years ago teleconferencing capability was poor at best, with pictures that at times could be difficult to watch. Now, people can Skype through their laptop with high quality images. Furthermore, the salesperson can send detailed reports through e-mail or other communication methods. Texting has also become a simple way for a manager to send a quick message to the salesperson. The continuing evolution of smartphones is allowing a salesperson and manager to be in constant contact with the capability to share detailed information. The sales manager does not have to be physically in the same geographic location as the salesperson to successfully supervise the individual. Even so, GPS tracking systems in smart phones or laptops can now allow managers to know exactly where their salespeople are at all times. Such monitoring can be a huge advantage for the sales manager in terms of sales force control, but may be considered the dark side of technology by the salesperson.

However, the social media and related technology capabilities have simultaneously created new opportunities for the sales organization and new challenges for the relationship between manager and salesperson. The sales organization of today does not have to continually bring the unit together physically, which allows for new sales structures and organization (see section 3.5). However, the downside of this new supervising capability is anxiety by the salesperson based on feeling on call and accessible 24/7. Today it is very easy to send a text, an e-mail, or a message through Facebook such that the salesperson is, simply put, always on duty. The day does not end at 5 p.m. Therefore, the sales manager needs to be cognizant of the need for privacy and down time by members of the sales force. Work-withs today can actually be done virtually through a Skype-like system. The manager can be on the sales call and yet never leave his/her office. An immediate conversation can occur between the two just prior to the call; likewise, it can occur after the call for instant contract approvals and the like.

Another potential issue is the manager’s ability to view salespeople’s Facebook or LinkedIn sites. Many individuals—especially from the younger generation of salespeople—have not been able to separate their personal social media communications from those that are work related; in fact, the typical approach is for younger salespeople to simply migrate their personal social media usage preferences into the workplace ([Marshall et al., 2012](#)). The manager may learn aspects of the individual that require more counseling, leading to some

Table 2. Sales management in a pre- and post-social media world

	VARIABLE	PRE-SOCIAL MEDIA	POST-SOCIAL MEDIA	IMPACT ON SALES MANAGEMENT
<b>SALES MANAGEMENT FUNCTIONS</b>				
1.	Supervision	<ul style="list-style-type: none"> <li>• Frequent personal work-withs</li> <li>• Weekly meeting</li> <li>• E-mail, phone</li> <li>• Periodic reporting</li> </ul>	<ul style="list-style-type: none"> <li>• Skype</li> <li>• Text messaging</li> <li>• In constant contact—can't hide</li> <li>• GPS dashboard</li> </ul>	<ul style="list-style-type: none"> <li>• Always on job—24/7</li> <li>• Less face-to-face time</li> </ul>
2.	Selection	<ul style="list-style-type: none"> <li>• In-person interviews</li> <li>• Limited information prior to interview</li> </ul>	<ul style="list-style-type: none"> <li>• Virtual interview</li> <li>• Limitless information prior to interview</li> </ul>	<ul style="list-style-type: none"> <li>• More and better candidate information</li> </ul>
3.	Training	<ul style="list-style-type: none"> <li>• Standard corporate training</li> <li>• On-the-job training</li> <li>• Train in groups</li> </ul>	<ul style="list-style-type: none"> <li>• Customized self-pace online training</li> <li>• Virtual worlds</li> </ul>	<ul style="list-style-type: none"> <li>• Training becoming personalized at individual level</li> </ul>
4.	Compensation	<ul style="list-style-type: none"> <li>• Traditional mix of salary, commission, and bonus</li> </ul>	<ul style="list-style-type: none"> <li>• Avant-garde rewards</li> <li>• Gamification</li> <li>• Continuous payouts</li> </ul>	<ul style="list-style-type: none"> <li>• Complete rethinking of compensation systems for younger salespeople</li> </ul>
5.	Deployment	<ul style="list-style-type: none"> <li>• Reliance on traditional geographic territories</li> <li>• Largely domestic</li> </ul>	<ul style="list-style-type: none"> <li>• Shift to non-geographic/virtual territories</li> <li>• Global accounts</li> </ul>	<ul style="list-style-type: none"> <li>• Need to re-deploy to two-tier system that includes key account and telesales/virtual</li> <li>• Conflict resolution by management due to non-geographic deployment</li> </ul>
<b>SALESPERSON PERFORMANCE</b>				
1.	Role	<ul style="list-style-type: none"> <li>• Traditional focus on 7 basic steps of selling</li> </ul>	<ul style="list-style-type: none"> <li>• More conflict and ambiguity due to move away from traditional 7 steps</li> </ul>	<ul style="list-style-type: none"> <li>• Create standards and policies for social media-enabled selling</li> <li>• Create a new culture that embraces effective use of social media</li> </ul>
2.	Aptitude/Skill	<ul style="list-style-type: none"> <li>• Personality is king</li> <li>• The key skill is <i>selling</i></li> </ul>	<ul style="list-style-type: none"> <li>• Technology acumen is king</li> <li>• Broader skill set is required</li> </ul>	<ul style="list-style-type: none"> <li>• Major impact on salesperson selection and training</li> </ul>
3.	Motivation	<ul style="list-style-type: none"> <li>• Money, money, money</li> </ul>	<ul style="list-style-type: none"> <li>• Social relationships based in part on a gamification sensibility among younger sales</li> </ul>	<ul style="list-style-type: none"> <li>• More clever intrinsic relationship rewards</li> </ul>

resentment. In summary, the new level of constant supervision can be a blessing or a curse for the organization depending on the skills and experience of the sales manager.

### 3.2. Lessons on selection

Historically, the sales force has been recruited in a number of ways. The sales manager frequently had

the responsibility of recruiting his or her own salespeople. They might go to college campuses, use referrals, or recruit through a variety of other methods. The sales manager was typically the first level of selection, and if the candidate was successful, he or she moved to round two with the next level of management or other organizational personnel. In this manner, the sales manager had a lot of autonomy on selection of the personnel for their district.

Today, human resources departments have taken a lot of that autonomy away from the sales manager. Many organizations have an automated HR site—typically on the organization website—that accepts applications and resumes. The automated system screens candidates and gives the sales organization a list of people to interview. This might be done at the headquarters level, and subsequently the hired person is assigned to a district with the sales manager having little say on the personnel to whom he or she is assigned.

In cases where the sales manager is still heavily involved in the recruiting and selection process, social media and related technology have become an additional tool for the selection process. Resumes are electronically sent to the individual and can include more than just a one- or two-page resume. Sites like LinkedIn allow the sales manager to get referrals from mutual contacts with member recommendations for the individual. However, the ultimate recruiting weapon has been Facebook, Instagram, and other social sites where the manager can look at the individual's personal pages and pictures in order to gain a level of knowledge about the person. Much of this process is a positive in that the manager can learn more about the recruit's personality, abilities, and history, which can help shape the hiring decision and determine the direction of later interviews. The downside for the recruit is that pictures of intense alcohol consumption or other unprofessional activities from days gone by can shape a perception of the recruit that leads to rejection of the candidacy.

Many argue that social sites are private and should not be used for business use. Yet the reality is that social sites are anything but private and have become part of the fabric of our culture. A developing trend is that knowledge gained by examining recruit or employee social media sites can lead to litigation if the employee does something unprofessional that should have been anticipated by the sales organization based on previous viewings of the social media site.

### 3.3. Lessons on training

Traditional training was either on the job, typically by the sales manager, or through some institutionally led training program—or a mixture of both. It was common for a new salesperson to spend a short period of time observing a more experienced sales rep and then to spend time with the sales manager for more training. Today, training often looks a bit different; it is driven by technology. Most companies have implemented some type of packaged online programming via which the new hire can work at

home at his or her own pace. Lessons can be prerecorded and training can be truly mass customized based on the needs of each new hire. Therefore, it is fairly common that a new hire starts and is trained as he/she goes rather than spending 2 weeks to a couple of months in classroom training.

Even more avant-garde, a growing movement toward the use of virtual worlds in training is afoot. Many people think of Second Life as the quintessential virtual world, but today sales organizations are customizing virtual spaces so that salespeople can go through training paces with avatars that represent buyers, other salespeople, and—of course—themselves. For example, consider a newly hired pharmaceutical salesperson whose initial difficult task is figuring out how to get past the receptionist's fortress and in front of the physician. A virtual world can easily simulate a doctor's office; and the rep, through his or her avatar, can practice entry techniques either against a pre-programmed set of client responses or 'live' (i.e., virtually) with senior reps' avatars playing the opposing parts. Welcome to the brave new world of sales training!

For sales managers, this means recalibrating the menu of training options to meet the learning preferences of a new generation of salespeople. In many companies, the sales manager must re-determine how much training the new hire needs and then develop the training program from the new list of options, which includes a mix of traditional and social media. The positive aspect of this is that the manager can recommend certain downloads or programs for the salesperson in his or her district who may need periodic refresher training, either during the work day or, in many cases, after hours—even via a smartphone. The dream of a readily available menu or ongoing training options that do not necessarily involve expensive travel or in-person managerial work-withs has been fulfilled.

### 3.4. Lessons on compensation

Compensation has generally been comprised of some combination of commission, straight salary, bonus, or other added variables such as benefits. Straight commission tends to be for companies whose primary goal is selling the product. Straight salary is for companies that have other sales activities and functions that are considered to be an important part of the sales job. Bonuses can be added to the above to emphasize accomplishment of particular goals or benchmark levels (quotas), such as acquisition of new customers, customer retention, customer satisfaction, and myriad other desired organizational outcomes. However, all of

these compensation techniques are primarily used as extrinsic rewards—rewards bestowed on the salesperson by the firm. There’s nothing at all wrong with extrinsic rewards; in fact, we would expect salespeople to relish them. But much research indicates that intrinsic rewards—rewards realized by the salesperson him- or herself based on achieving personal and professional satisfaction—have been shown to be very powerful and sometimes carry more weight than extrinsic rewards, especially with a younger generation of salesperson.

In the intrinsic side of things, social media and related technology come into play for compensation through the opportunity for *gamification*. Gamification is broadly defined as the use of game design elements—also referred to as game elements or game mechanics—in non-game contexts, such as a work environment (Deterding, Dixon, Khaled, & Nacke, 2011). More specifically, gamification implies tying in one or more game elements to task outcomes in order to change individual employee behaviors and increase performance and/or achieve other organizational objectives. Given the clarity in nature of most salesperson performance objectives, gamification is a great fit.

But what is the actual compensation delivered through a gamification approach? Remember that today’s generation of salespeople mostly have grown up as gamers, and gamers love the competition of working toward achieving certain levels of achievement in the game—in competition against (1) others (many of the games involve social media applications), (2) their own prior performance levels, or (3) a preset achievement level that is built into the game itself. All of these approaches can be easily adapted to a sales environment, given the nature of the sales job. The specific rewards in such games (e.g., getting a gold star or a warm and fuzzy feeling that “I did it!”) are commonly referred to as ‘badges’: hence, an intrinsic reward. However, badges can also easily be translated as they accumulate into opportunities for extrinsic rewards in the form of various types of compensation mentioned earlier in this section.

For the sales manager, a shift to social media-enabled gamification platforms represents a sea legs change in how salesperson compensation will be managed as the younger generation becomes predominant in sales. For better or worse, games are the way this generation often socializes and learns. Thus, sales managers must not only rethink the meaning and modality of compensation platforms going forward, but also become savvy themselves in the intricacies of administering a game-based compensation scheme.

### 3.5. Lessons on deployment

The social platform communication methods and increase in global business are changing the way sales units are deployed. The traditional sales force was geographically divided into districts with a varying number of contiguous territories—which were typically created by higher level sales management (i.e., a vice president of sales or similar rank)—within each district. The sales manager had to supervise and lead each of these salespeople. In addition, the sales manager reviewed sales for each of his or her territories and executed sales force control accordingly.

In today’s more highly advanced technological world, we are seeing territories that are not contiguous, but are created with other organizational goals in mind—basically, territories without borders. As highlighted earlier, social media and related technology allow the manager to be in contact with his or her salespeople 24/7. Skype or an equivalent facilitates virtual meetings, and virtual world technologies allow for training without travel. Accounts themselves are becoming more global in nature and pure physical territories are becoming more regional or global. Marshall et al. (2012) found managers located in one country managing salespeople half a world away; thus, many conversations between the two are at an inconvenient time of day for one party. This again brings up the dark side of social media for salespeople: such job expansion and always-on-duty mindsets are precursors of role stress and burnout.

Thoughtful sales organizations and their managers are addressing these changes by rethinking deployment around the 80/20 rule: a two-factor model that includes key account salespeople that handle the majority of the revenue-producing customers (the 20% of the business producing 80% of sales) and telephone or other virtual reps (either in-house or outsourced) that handle the vast majority of customers that are small yet still contributing to profitable revenue. Today, firms for which their sales organizations are not bifurcated in this way will rapidly lose their competitive edge. In addition, because of the shifts away from straightforward geographic forms of deployment, managers will find that they must assume a more active role in conflict resolution as necessary to clarify which salespeople are responsible for which customers.

## 4. Salesperson performance

The previous discussion about sales management functions connects to the salesperson performance dimensions of Figure 1: role, aptitude/skill, and

motivation. Again, the key points are summarized in [Table 2](#).

#### 4.1. Lessons on the sales role

There has clearly been a shift toward user-driven technologies such as blogs, twitter, and social media networks over the past handful of years ([Smith, 2009](#)). The result of this revolution in new selling tools means that salespeople—even if they still follow the traditional seven steps of selling—are employing new selling methods. Those steps are commonly described as prospecting, pre-approach, approach, presentation, handling objections, close, and follow-up. Each phase of the selling process requires a new set of skills and abilities, and every sales tactic and organizational sales strategy has the potential to be affected by the implementation of social media and related technology as a selling tool ([Andzulis et al., 2012](#)). Let's consider the impact of this implementation on each step.

For example, the basic prospecting stage has evolved considerably with the advent of social media. In the past, telemarketing has been heavily used, but it is an expensive tool and requires someone comfortable enough to sit at a phone all day and make calls to generate leads. Now, social media tools can drive potential customers to the organization. Referrals coming from LinkedIn, interest from blog sites, 'likes' on Facebook, and large scale analytics of Twitter messages are changing the way we prospect for new customers. Much of the content referred to in the newly popularized term 'big data' comes from social media site databases.

In the pre-approach and approach stages, a salesperson can look at the prospect's webpage and get a feel for the specific needs of the potential customer, thus potentially precluding a fact-finding initial sales call. Presentations and related ongoing contact with clients now occur continually through social media outlets and webpages, including the use of YouTube video capabilities, WebEx, and other connective platforms. Customers are on their own searching for information from myriad sources, and in many cases, approaching the sales organization well before being contacted by a prospecting selling organization. Not only does the salesperson listen, but sales and marketing organizations also listen to customers through conversation/dialogue that is occurring via webpages and social media sites. It may seem odd, but in this new environment, closing a sale may occur without an actual sales call, as customers have such strong ownership of the process through the steps described above. Finally, the follow-up step is continual through a variety of methods. We are no longer phoning to ask how

the product is working or if there are problems; instead, we have instantaneous feedback through social media and related technology and are fully informed about the success or failures of the product, the results of which may be forwarded to others. And of critical importance, a premium is now placed on having customers post positive reviews or tweet about their experiences with the entire selling process with the company.

So in terms of the evolving role of today's salesperson, it is clear that he or she has to work through new channels, be flexible to adapt to continual information from customers and the marketplace, and take on a collaborative style with clients that often have as much or more information about the product as the sales organization itself does. Sales managers have to set the stage for their salesperson to be comfortable with the technological tools that enable success, and through the sales management functions covered in the prior sections, ensure that the sales force can effectively implement them with customers.

#### 4.2. Lessons on sales aptitude and skill

Aptitude is generally considered as an innate capability on which skills training can build. Social media is about continuing communication and relationship development, and ultimately the co-creation of value. Social media allows selling firms to interact with numerous customers simultaneously and yet in a customized manner. Social media and related technology are also a selling tool for firms to adapt a pull strategy rather than a more traditional sales push strategy ([Rapp & Panagopoulos, 2012](#)). Based on these properties, the aptitude and skill requirements of the sales force are changing.

Because of the pull strategy, salespeople are adopting some of the same traits as typical advertising employees, with creativity becoming more of a necessary attribute in today and tomorrow's salesperson. [Andzulis et al. \(2012\)](#) argue that a firm must first go through four phases with their social media selling. First, the firm must establish a social media presence. In phase 2 they must determine how to drive customers/potential customers to the social media. These initial two steps have been more traditionally within the purview of marketing but clearly are migrating to the sales role. Phase 3 is viewing social media as a primary or secondary selling tool; thus, the firm's sales strategy begins to evolve. In the final phase, social media is fully integrating into sales strategy. This evolving social media strategy will eventually require a different type of salesperson, which implies different aptitudes for the role than before.

As an example, [Marshall et al. \(2012\)](#) report that virtually all the salespeople they interviewed were using social media in some aspect. However, interestingly, more experienced and older salespeople were using social media like LinkedIn and Facebook for contacts, but still actually selling in mostly traditional ways. Younger salespeople were using social media to drive business and build relationships, even to the point of not wanting or needing to conduct face-to-face selling. Think of the impact on skills training of salespeople by sales managers required when much of the relationship selling model moves away from face-to-face!

### 4.3. Lessons on motivation

Motivation is the force that directs behavior, and it is unique to each individual. A sales manager must determine what will motivate each of his or her reports. The concept of working smarter—being more productive with less effort—has been prominent for some time. The new social media and related technology allow salespeople to indeed have the opportunity to work smarter. Information is abundant and available to both selling and buying organizations. As a result, some argue that the balance of power has shifted from the firm to its customers ([Rapp & Panagopoulos, 2012](#)). The advent of social media has forever changed the way interactions take place. Younger employees are defined to some degree by the social media platforms that they use as an integral part of each day, and they tend to bring their personal platforms into the workplace. Older sales personnel tend to employ social media as a selling tool but not necessarily embrace the social media platforms as a way of life. As a result, customer relationships are being developed through social media and less through face-to-face contact. Managers report that younger salespeople are more reluctant to make personal sales calls, relying more on selling and relationship development through the use of social media and related technology. At the same time, younger generation organizational buyers are shying away from primarily doing business in person with their salespeople for the same reasons.

As a result of these shifts, sales managers find themselves in the unique role of having to motivate younger salespeople to actually go out and make more face-to-face calls when the situation requires, since it's not their tendency. At the same time, older salespeople may be hesitant to accept the new technologies even though in a growing number of cases the customer has totally embraced social media and related technology as a way to enhance the way they conduct business. So again, sales

managers are tasked with finding appropriate ways to motivate that group, embrace these new selling methods, and overcome their technological inadequacies.

As has always been true, the sales manager must determine what motivates the sales employee regardless of age. In the previous section, a variety of options are touched on regarding the sales management function of compensation. If an extrinsic motivation such as making more money or being recognized as top salesperson is the driving force, then the sales manager should have a relatively clear course of action in terms of overtly rewarding salespeople for effectively using social media and related technology, such as reviewing the number of prospects generated on LinkedIn or tracking customer feedback via Twitter ([Levin, Hansen, & Laverie, 2012](#)). If the motivation is intrinsic and social interactions in the workplace are the driving force, then the sales manager has a different set of options for motivation, including creative approaches such as gamification discussed earlier in this article.

## 5. Final thoughts

Now, let's go back to Burt's rough week, culminating with that Friday night Scotch. It's important for Burt—and for all contemporary sales managers—to benefit from the lessons described above. Recall Burt's particular challenges:

- A 'border dispute' about who gets credit for a sale facilitated by two salespeople through social media.
- Undependable connectivity in an important virtual meeting, which is impeding a client relationship.
- Reluctance by a young salesperson to actually make face-to-face sales calls instead of practicing the generationally preferred virtual selling approach.
- Personal insecurity about how his company's new gamification-driven compensation platform works.

Clearly, the lessons highlighted across the five sales management function areas (i.e., supervision, selection, training, compensation, and deployment) and the three aspects of salesperson performance (i.e., sales role, sales aptitude and skill, and salesperson motivation) can help our friend Burt immensely. In an era of social media and related technology, a

heightened awareness of the key takeaways outlined herein will lead to both a more sophisticated approach to the issues and increased confidence and job satisfaction. So on Monday morning, when Burt is refreshed and ready to proactively take on the new challenges of managing salespeople—and customer relationships—he can use the lessons presented here to address his particular challenges as well as any others that may arise.

Admittedly, not all firms are going to take on a social media focus, just like not every firm has bought into a traditional relationship selling focus over transaction-based selling. Our position is not whether sales organizational leaders should be working to get ahead of the social media curve, but rather how and how fast they will be able to embrace social media and related technology strategies in sales for competitive advantage. This article provides strong evidence that sales managers are in a critical role within the firm to positively impact organizational success in this manner.

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