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David W. Nylen
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C.38 *Selling Tasks*

DEVELOPING THE PERSONAL SELLING PROGRAM

Personal selling is one of the major means through which marketing plans are carried out. Thus, if the marketing plan is to be implemented, it must be strongly linked to per-

sonal selling.¹ It is the job of the personal selling program to forge this link with other elements of the marketing plan.

¹Jon R. Katzenbach and R. R. Champion, "Linking Top-Level Planning to Salesman Performance," *Business Horizons* (Fall 1966), pp. 91-100.

The Role of Personal Selling in Marketing Strategy. Coordination of personal selling with other elements of the marketing strategy can be accomplished by preparing a personal selling program as a part of the **marketing planning process** (see Chapter 4). Doing so means that the personal selling program will benefit from the **situation analysis** conducted as the first stage of the planning process, that it will receive direction from the positioning of the products to be sold, and that personal selling will be coordinated with other elements of the marketing mix.

Personal selling is part of the **marketing mix** (see GLOSSARY entry C.16). It is usually considered, along with advertising, sales promotion, and publicity, to be a part of the promotion variable. The relationship between the elements of the promotion program is defined by the **promotional mix** (see GLOSSARY entry C.29).

The personal selling program is also closely related to other nonpromotional elements of the marketing mix. Personal selling serves as a communications link between customers and the company's marketing strategy. Decisions made in other marketing

mix programs determine the content of sales force communications. For example, the **product line decision** (GLOSSARY entry C.27) determines which products will be stressed by the sales force and the **customer service** program (GLOSSARY entry C.9) determines the level of service that can be offered to customers. The structure of the distribution channel (GLOSSARY entry C.10) determines whom the salespeople will call on and the **distribution intensity** decision (GLOSSARY entry C.12) defines how many customers will be called on. The pricing program determines the prices that the salespeople will offer, their flexibility, and the discounts available (see GLOSSARY entry C.23). Other programs define the **channel cooperation** (GLOSSARY entry C.6) and **sales promotion** (GLOSSARY entry C.36) support that the sales force can offer.

Figure C.38-1 depicts the relationships among personal selling and other elements of the marketing planning process.

Personal Selling Objectives. As in other marketing mix programs, developing the personal selling program begins by setting objectives, followed by development of indi-



FIGURE C.38-1

Personal Selling as Part of the Marketing Planning Process

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vidual program elements to carry out those objectives. If the sales force sells the whole product line of the business, the personal selling program would normally be developed for the entire business rather than separately for each product.

Personal selling objectives define what the personal selling program is to accomplish in the planning period and set direction for the selling program elements that follow. Personal selling objectives are developed as responses to problems and opportunities found through the situation analysis and they are designed to support the positioning and marketing mix of the product lines to be sold. Selling objectives that should be set will usually include these:

- *Sales Volume Objective.* A specific sales volume objective should be set for the personal selling program. This objective usually utilizes the results of **sales forecasting** done during the **situation analysis**. (See GLOSSARY entry A.16 on sales forecasting.) The sales objective, for a multiproduct firm, is usually defined by product as well as in total. The sales volume objective becomes a basis for setting sales quotas for individual salespersons and territories.
- *Selling Task Objective.* An objective should be set that defines the selling tasks that the salespeople are expected to undertake. This objective will define how salespeople are to allocate their time among such tasks as selling to existing customers, prospecting for new customers, and providing advice and assistance to customers. Determining the selling task objective is the subject of the second part of this entry.
- *Other Objectives.* Other objectives for the personal selling program may be derived from problems and opportunities defined in the situation analysis or from other marketing mix programs that the selling program is to support. For example selling objectives might include controlling selling costs, developing new target markets, introducing new products, or developing new distribution channels.

The Personal Selling Program. With personal selling objectives set, the personal selling program details how the sales organization will go about meeting those objectives. The separate parts of the personal selling program are coordinated and directed by the personal selling objectives. Important

among these objectives are the **selling tasks**, the subject of this entry. Elements that should normally be included in the personal selling program and their relationships to **selling tasks** and other selling objectives are described below. Each program element is also the subject of a separate GLOSSARY entry.

- *Compensation of Salespeople.* This part of the personal selling program defines the method of compensating the sales force. The need for compensation or other incentives to motivate salespeople depends upon the type of selling task to which the salespeople are assigned. **Compensation of salespeople** is described in GLOSSARY entry C.8.
- *Sales Force Size.* The size of the sales force is strongly influenced by the sales volume objective set for the personal selling program. The higher the sales volume objective, the more salespeople will be needed. The process for making the **sales force size** decision is presented in GLOSSARY entry C.35.
- *Recruiting and Selecting Sales Personnel.* Plans to recruit and select new salespeople depend upon the number of new salespeople to be hired to meet volume objectives and also upon the kind of tasks that salespeople will be called upon to perform. The characteristics sought in salespeople vary with the task to which they will be assigned. **Recruiting and selecting sales personnel** is covered in GLOSSARY entry C.31.
- *Training of Salespeople.* The extent and the nature of sales force training depends upon the number of new salespeople hired to meet sales objectives and, more importantly, on the tasks assigned to the sales force. **Training of salespeople** is considered in GLOSSARY entry C.39.
- *Sales Territory Design.* Redesign of the geographic or other territory to which salespeople are assigned is usually necessary when the sales force size changes to meet volume objectives or when environmental factors change. In designing new territories, the territory size that an individual salesperson can handle is dependent, in part, on the tasks assigned to salespeople. **Sales territory design** is considered in GLOSSARY entry C.37.
- *Sales Force Organization.* This program determines whether the sales force should be structured by geographic area, customer, product line, or in some other way. The choice is partly dependent on the selling task. Sales force organization provides a way to heighten specialization and bring focus on important selling

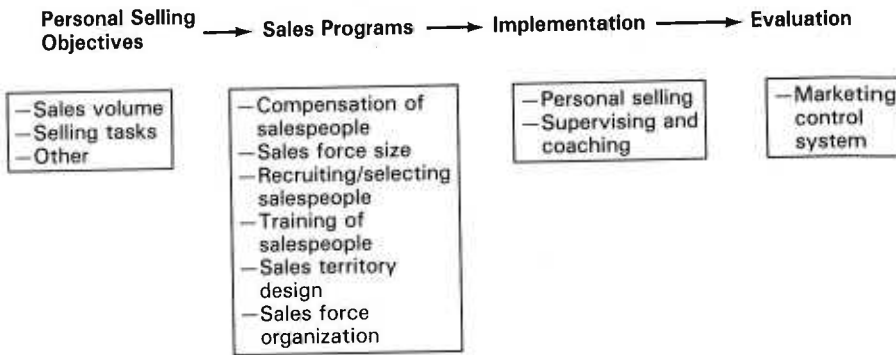


FIGURE C.38-2

The Personal Selling Program Development Process

tasks. **Sales force organization** is considered in GLOSSARY entry C.34.

The techniques of **personal selling**, considered in GLOSSARY entry C.20, are not a selling program element, but represent a skill utilized by the sales force in implementing the personal selling program. However, selling techniques also take direction from selling task objectives. Different selling tasks require different selling approaches.

Figure C.38-2 pictures the process of developing the personal selling program.

DEFINING PERSONAL SELLING TASKS

Defining the selling tasks that the sales force is expected to undertake provides important direction to the elements of the personal selling program and its implementation.

Four Tasks of Personal Selling. A variety of systems for classifying personal selling tasks have been proposed. They are summarized in Figure C.38-3. Any of these classifications might be used, depending upon the needs of the sales organization. For our purposes, we will utilize the classification system proposed by Newton.² He suggests that the four

tasks of personal selling are trade selling, missionary selling, technical selling, and new business selling.

■ **Trade Selling.** The focus of **trade selling** is to build volume through existing customers with much of the salesperson's time devoted to providing promotional assistance and helping the customer become a more effective seller. It can be described as selling "through" the customer rather than "to" the customer. Products sold in this way are usually mature. Trade selling is common among food and household products manufacturers and wholesalers. The salesperson's selling style is low key, attempting to build long-term customer relationships by being helpful to the customer and understanding the customer's business. The salesperson attempts to maintain the existing channel of distribution and improve its effectiveness.

■ **Missionary Selling.** The task of **missionary selling** is to provide selling assistance to its direct customers. It is used by manufacturers who sell indirectly through intermediaries to retailers or end users. A pharmaceutical firm, for example, that distributes through wholesalers to pharmacies may use missionary salespersons to call directly on pharmacies to persuade them to stock and recommend the manufacturer's product. Although order would not be the primary purpose of the call, any orders generated would be transmitted back to the wholesaler. This is selling "for" the customer rather than "through" the customer. Missionary selling is often used for new products or established products where selling ef-

²The description that follows is based on Derek A. Newton, "Get the Most Out of Your Sales Force," *Harvard Business Review* (September-October 1969), pp. 130-43.

FIGURE C.38-3

Personal Selling Task Classification Systems

Newton	Kotler	McCarthy	McMurry
Trade selling	Prospecting	Order getting	Product delivery
Missionary selling	Communicating	Order taking	Inside order taking
Technical selling	Selling	Supporting	Field order taking
New business selling	Servicing		Good will/education
	Information gathering		Technical consulting
	Allocating		Creative selling—tan- gible products
			Creative selling—in- tangible products

Sources: Derek A. Newton, "Get the Most Out of Your Sales Force," *Harvard Business Review* (September–October 1969), pp. 130–43; Philip Kotler, *Principles of Marketing*, 3d ed. (Englewood Cliffs, N.J.: Prentice Hall, 1986), pp. 546–47; E. Jerome McCarthy and William D. Perreault, Jr., *Basic Marketing*, 9th ed. (Homewood, Ill.: Richard D. Irwin, 1987), p. 399; and Robert N. McMurry, "The Mystique of Super Salesmanship," *Harvard Business Review* (March–April, 1961), pp. 113–22.

fort beyond that provided by a middleman is required.

- **Technical Selling.** The task of **technical selling** is to increase sales to existing customers by providing them with direct technical assistance and advice in the application of the company's products. Technical selling is appropriate where sales are made direct to end users rather than indirectly through intermediaries. Technical selling requires specialized technical skills in problem solving and product application. It is widely used in the marketing of complex industrial products, including component parts, accessory equipment, and installations.
- **New Business Selling.** The primary task of **new business selling** is to find prospects for the company's products and convert them into customers. New business selling is required to build a customer base for new products, but it is also used for established products to build the base of business. Establishing a channel of distribution requires new business selling. New business selling is normally a part of the personal selling task for any product, new or old, industrial or consumer. Because of the high rate of rejection, new business selling requires self-motivated salespeople with high self-confidence and maturity.

Criteria for Determining Selling Tasks. A sales force seldom defines one of the four selling tasks as its sole objective. Indeed,

most recognize the need for a mix of tasks. Thus the problem is one of determining the appropriate allocation of time among tasks. The mix will depend upon other elements of **the company's marketing strategy and on the market situation that it faces.** Criteria to assist in defining the selling task are presented below. These criteria can also be useful in analyzing sales force problems, helping to determine if the current sales force allocation of time between tasks is appropriate.

- **Positioning.** The positioning of product lines sold may provide direction in defining selling tasks. For example, if the competitive advantage of a product line lies in its adaptability to customer problems, presenting this advantage may require technical selling. Products whose positioning relies on complex and difficult-to-understand attributes require greater emphasis on missionary or technical selling.
- **Product Characteristics.** The characteristics of the products sold will influence the mix of selling tasks. Industrial products use more technical selling while consumer products use more trade selling. New products require more emphasis on new business selling than do established products. In the **industrial goods classification system**, components, installations, and high cost accessories call for technical selling. Supplies and low cost accessories call for

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trade selling (see GLOSSARY entry A.7). In the **consumer goods classification system**, convenience goods require primarily trade selling while shopping goods may call for greater use of missionary or technical selling (see GLOSSARY entry A.3).

- **Promotional Program.** Decisions made in the promotional program will influence selling tasks. The **promotional mix** decision determines the allocation of funds among advertising, sales promotion, publicity, and personal selling (see GLOSSARY entry C.29). **Emphasis on technical selling direct to end customers** is costly and not usually feasible unless the promotional mix emphasizes personal selling. A **promotional mix heavily weighted toward advertising** may limit the selling task to trade selling. The **push versus pull** decision can also influence the selling task mix (see GLOSSARY entry C.30). If a push effort providing promotional support for channel intermediaries is used, strong trade selling will be necessary to communicate that support to channel members.
- **Channel of Distribution.** The structure of the channel of distribution will influence the mix of selling tasks. Direct channels call for use of technical selling while indirect channels favor trade and missionary selling. (See GLOSSARY entry C.10 on **direct versus indirect distribution**.) **Forming a new channel of distribution** requires a high proportion of new business

selling while a mature, established channel calls for a high proportion of trade selling.

- **Product Life Cycle.** The allocation of time **between selling tasks will change over the product life cycle** (see GLOSSARY entry A.15). During the introductory stage, new business selling will be most important to establish the channel of distribution and to build a base of customers. It will diminish through each successive stage, giving way to trade selling in later stages. Technical and missionary selling will be most important at earlier stages of the product life cycle when the product is unfamiliar and differentiated. As the product matures and becomes more familiar and commodity-like, trade selling will become more important.

SUGGESTIONS FOR FURTHER READING

- HENRY, PORTER. "Manage Your Sales Force as a System." *Harvard Business Review* (March–April 1975), pp. 85–95.
- KATZENBACK, JON R., and R. R. CHAMPION. "Linking Top-Level Planning to Salesman Performance." *Business Horizons* (Fall 1966), pp. 91–100.
- NEWTON, DEREK A. "Get the Most Out of Your Sales Force." *Harvard Business Review* (September–October 1969), pp. 130–43.