June 2017

Essays on Sales Coaching

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Essays on Sales Coaching

by

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A dissertation submitted in partial fulfillment of the requirements for the degree of Doctor of Philosophy
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Date of Approval:
June 7, 2017

Keywords: Sales coaching, sales performance, self-determination theory, structural equation modeling, scale development

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DEDICATION

It’s been a long journey, but could not have been possible without the love and support of my family. I dedicate this dissertation to my mother, brother, and sister.
ACKNOWLEDGEMENTS

This dissertation would not be possible without the support, mentorship, and coaching I received from faculty and friends.

First, I would like to thank my dissertation committee. Drs. Andrew Artis, Paul Solomon, and Richard Plank. Each of you has helped me become the scholar I am today. I appreciate each of you for your unyielding support throughout this whole process. I like to brag to my colleagues that I have the best committee ever.

Second, I would like to thank my friends who have kept me healthy and sane throughout this journey. Your food gave me much needed comfort (and made me fat), your jokes made me laugh which helped burned those extra calories, and your friendship kept me occupied and sane. Finally, special thanks to my fellow classmates and colleagues who have helped me through this program. Thanks for listening to me vent when I needed someone to talk to – only another doctoral student can truly understand the frustration and demands of the program ☺. You all have helped me grow as a person, teacher, and scholar.
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ABSTRACT

In general, scholars and practitioners agree that sales coaching enhances sales performance. Sales firms continue to invest billions of dollars towards coaching endeavors. However, despite the positive benefits of sales coaching, the fact is that most sales coaches are ineffective. In three essays, this dissertation aims to offer insight that will help companies and coaching programs improve the effectiveness of their sales coaches.

The first essay explores the sales coaching process and how it is affected by factors related to the sales manager (coach) and the salesperson (coachee). Using in-depth interviews, we identified various skills, behaviors, and abilities that reflect the overall effectiveness of the sales manager as a coach, as well as gained a better understanding of how effective sales coach indirectly affects a salesperson’s performance. We also identified different behaviors, preferences, and characteristics related to the salesperson that affect the sales coaching process.

The second essay is focused on the development and validation of a sales coaching effectiveness scale (SCES). We identified, measured and validated a three-factor, 16-item scale that reflect dimensions of effective sales coaches: involvement, rapport, and adaptability. The SCES scale is distinguished from previous coaching scales that were designed and validated in non-coaching contexts. The SCES scale offers benefits to practitioners and academics.

The third essay is focused on measuring how effective sales coaches affect sales performance. Drawing on self-determination theory, we proposed a dual-process model in which effective sales coaches influence performance through motivation and through sales
development. One, the results suggested that effective sales coaches intrinsically (versus extrinsically) motivate salespeople to exert extra effort towards selling, which increases their overall sales performance. Two, the results suggested that effective sales coaches enhance the selling confidence among salespeople, which allows them to adapt their selling behaviors to various selling situations and buyers, thus increasing their overall sales performance.
ESSAY ONE:

AN EXPLORATORY STUDY OF THE FACTORS THAT IMPACT

THE SALES COACHING PROCESS

Sales coaching has become one of the top skills among effective sales managers in the development and performance enhancement among salespeople (Deeter-Schmelz, Goebel, and Kennedy, 2008; Ingram et al., 2005). Sales coaching may effectively address the various challenges that changes the present selling environment and, thus, sales process. Recently, scholars have identified three trends that complicate the sales process: complexity of the selling environment, collaboration among constituents within organizations, and accountability to stakeholders (e.g., buyers, firm, community, etc.) (Ingram et al., 2005). This new selling environment emphasizes the need for salespeople with critical knowledge, skills, and abilities (KSAs) (Verbeke, Dietz, and Verwaal, 2011).

Sales coaching, is a multidimensional process that involves feedback, role modeling, and sales manager-salesperson trust behaviors (Rich, 1998). Sales coaching is best described by Badrinarayanan et al. (2015) as “an action-oriented process of equipping salespeople, sales managers and senior sales executives with appropriate KSA [knowledge, skills and abilities] that will contribute toward cognitive, emotional and behavioral development and enable them to achieve sales task-related and organization-related goals and objectives in an effective manner (p. 1092).” A recent survey by the Sales Management Association (2014) found that coaching is the number one factor that impacts organizational effectiveness. For example, LSA Global
(2016) found that among those who were coached (versus non-coached) the average revenue per sales representative increased by 113% and the average skill adoption rate increased by 20%.

Similarly, in a study by the Corporate Executive Board Company (2015), sales representatives who were given just three hours of coaching a month exceeded their goals by 7%, boosted revenue by 25%, and increased the average close rate by 70%.

Despite its benefits, academic research on sales coaching has been limited and fragmented (Badrinarayanan et al., 2015; Onyemah, 2009). Previous coaching scholars have primarily investigated why managers engage in coaching activities (Beattie et al., 2014) and whether coaching enhances overall employee performance (Agarwal, Angst, and Magni, 2009; Ellinger 2003; Ellinger, Ellinger, and Keller, 2003). However, there remain divergent views on the definition and processes of coaching. Badrinarayanan and colleagues (2015) asserts that the sales coaching literature contains “broad chasms in systematic research on the sales coaching process [such that] very little is known on how the sales coaching process is influenced by salesperson, sales manager, sales coach, and organization-related factors (p. 1088).”

Therefore, the purpose of this paper is to answer this call to research. We address the following research questions below using a grounded theoretical approach through in-depth interviews with sales managers and salespeople.

1. What factors related to the sales manager (as sales coach) affect their coaching decisions and behaviors?
2. What factors related to the salesperson affect their attitudes and response to coaching?
3. What are the outcomes of sales coaching and how do they impact sales performance?
LITERATURE REVIEW

Sales Coaching

Coaching can be described as a “process of equipping people with the tools, knowledge, and opportunities they need to develop themselves and become more effective” (Peterson and Johnson Hicks, 1996, p. 14). Some researchers believe that coaching is a way to facilitate learning (Beattie, 2006; Ellinger and Bostrom, 1999; Ellinger, Beattie, and Hamlin, 2010). Generally, definitions of coaching in other domains have some mention of facilitation or helping others through an issue (Hamlin, Ellinger, and Beattie, 2008) and a trust-based relationship (Gregory and Levy, 2010; Peterson and Hicks, 1996).

Indeed, in a literature review of popular press (non-academic) articles, Rich (1998) found that sales professionals typically discussed sales coaching as a multidimensional activity made up of three constructs: supervisory feedback, supervisor role modeling, and sales manager-salesperson trust. Corcoran et al. (1995) defined sales coaching as the “sequence of conversations and activities that provide ongoing feedback and encouragement to a salesperson or sales team member with the goal of improving that person’s performance (p. 188).” In an effort to distinguish sales coaching from other forms of coaching (e.g., executive coaching, athletic coaching, etc.), Badrinarayanan et al. (2015) described coaching as “an action-oriented process of equipping salespeople, sales managers and senior sales executives with appropriate KSA [knowledge, skills and abilities] that will contribute toward cognitive, emotional and behavioral development and enable them to achieve sales task-related and organization-related goals and objectives in an effective manner p. 1092.” For the purposes of this paper, we adopt the definition offered by Badrinarayanan et al. (2015) with the exception that our examination focuses on the sales coaching interaction between the sales manager (as coach) and the
salesperson (as coachee) as most sales coaching occurs between these two constituents (Richardson, 2016).

There are many benefits of coaching to firms and individuals. Practitioners and Academics acknowledge the benefits of sales coaching on sales performance (Corcoran et al., 1995; Rich, 1998; Richardson, 2016; SMA, 2014). According to SMA (2014), coaching has the most impact on overall sales effectiveness. In fact, what separated the top performing firms from the low performing companies was coaching, i.e., coaching activities by managers, organizational support of coaching, and a culture of coaching (SMA, 2014). Coaching has been shown to positively correlate with salesperson motivation, role ambiguity, job satisfaction, satisfaction, and job performance (Badrinarayanan et al., 2015; Onyemah, 2009). Coaching may also help salespeople develop active empathetic listening skills, which enhances buyer-seller interactions (Comer and Drollinger, 1999). Finally, sales managers can use coaching techniques to help their salespeople cope with sales call anxiety (Kemp et al., 2013; Verbeke and Bagozzi, 2000), thereby influencing the attributions and behavioral intentions of inexperienced salespeople who are more prone to failing more frequently in the early part of their career (Badovick et al., 1992; Dixon et al., 2003).

**Antecedents of Coaching**

Much of the research on managerial coaching has focused on the factors that motivate managers to coach (Beattie et al., 2014). Researchers and practitioners have cited that the reasons that managers do not devote more attention to coaching are due to the firm’s culture, managerial norms, and manager’s internal beliefs (Badrinarayanan et al. 2015; Evered and Selman, 1989; Orth et al., 1987; SMA, 2014). Orth et al. (1987) posited that the lack of managerial coaching may be due to: (1) the absence of a reward that would incentivize the manager to engage in
coaching activities with their employees, (2) lack of a corporate culture of coaching, and (3) insufficient training provided by the firm to develop appropriate coaching skills, knowledge, and abilities. Similarly, Evered and Selman (1989) asserted that the lack of managerial coaching may be attributed internally such that managers may not coach to avoid having their weaknesses revealed to their employees or that managers do not want to be directly responsible for the salesperson’s poor performance.

A firm’s culture and environment can influence coaching engagement. For instance, Beattie (2006) found that coaching was more prominent within companies that supported and promoted learning. Managers were especially more motivated to coach if they had to (job requirement) or if they had a desire to help others (Beattie, 2006). In addition, Pousa and Mathieu (2010) found that managers engage in more coaching (versus commanding) when firms focused more upon long-term (versus short-term) results.

A manager’s coaching behavior can also be affected by his/her attitudes and beliefs. Heslin, Vandewalle, and Latham (2006) examined the role of Dweck’s implicit person theory (Dweck, Chiu, and Hong, 1995), which states that people hold varying beliefs about the malleability of personal attributes. The authors demonstrated that managers who believed personal attributes are malleable and can be improved upon were more likely to engage in coaching activities than those who thought that personal characteristics are fixed and static.

The extant research has helped academicians and practitioners understand the motivating factors that influence managers to engage in coaching (i.e., factors that influence coaching behaviors). However, there is no research, to our knowledge, that identifies whether and to what extent specific skills, backgrounds, attributes, dispositions and experiences of a coach influence coaching decisions and behaviors of sales managers (Badrinarayanan et al., 2015; Feldman and
Lankau, 2005). Thus, an examination of the sales manager characteristic and the impact on the sales process is necessary.

In addition, much of the coaching research has been focused on the sales manager. Yet, empirical research on individual characteristics of the salesperson and the impact on the coaching process has been limited. Sales researchers recognize that coaching practices need to be tailored to the individual based on the salesperson’s characteristics (e.g., age, gender, career stage, and readiness for change) (Chonko, Roberts, and Jones, 2006; Onyemah, 2009). Onyemah (2009), for example, found that coaching efforts should be devoted more to salespeople who are younger, are less confident in the competitiveness of the product that they are selling, are less educated, and who do not share the same values as the firm. Sales managers have stated that coaching approaches and behaviors change depending on the individual being coached (Badrinarayanan et al., 2015). Shannahan, Bush, and Shannahan (2013) showed that salespeople vary in their coachability, which is “the degree to which salespeople are open to seeking, receiving, and using external resources to increase their sales performance in a personal selling context (p. 41).” Less coachable salespeople are not as receptive to management practices. Therefore, from a coaching perspective, it is important to identify the personal characteristics and traits of salespeople that influence how they respond to coaching behaviors. Badrinarayanan et al. (2015, p. 1094) calls for research that would provide “managers and coaches with better knowledge about how [salespeople] learn and respond to feedback and, importantly, the selection of the best method to provide personalized coaching.”

Outcomes of Sales Coaching

Empirical research on the outcomes associated with sales coaching is limited (Badrinarayanan et al., 2015). Generally, the coaching literature shows that effective coaching
leads to positive outcomes. For example, coaching has been linked with greater levels of individual performance (Agarwal, Angst, and Magni, 2009; Deeter-Schmelz, Goebel, and Kennedy, 2008; Ellinger, Ellinger, and Keller, 2003). However, no strong theoretical evidence exists to explain the phenomenon and identify the drivers (coaching behaviors or actions) of performance. Other researchers have also suggested that sales coaching may potentially influence key sales-related outcomes such as ethical behavior, resistance to change, customer orientation and job stress (Badrinarayanan et al., 2015; Chonko, Roberts, and Jones, 2006; Honeycutt et al., 2001; Jaramillo et al., 2006).

Researchers have also shown that coaching impacts salespeople’s attitudes and behaviors. For instance, Onyemah (2009) showed that coaching could influence salespeople’s affective commitment, intrinsic motivation, role ambiguity, job satisfaction, and satisfaction with the supervisor. The authors demonstrated that the response is moderated by the salesperson’s age, tenure, confidence with the product, level of education, fit with the organizational values, and the quality of communication with management. Their model was based on the leader-member exchange (LMX) theory, which posits that the relationship quality between manager and subordinate varies among individual subordinates and that the quality of that relationship influences the manager’s and the subordinate’s attitudes and behaviors (Gerstner and Day, 1997). LMX is one of the most adopted theories in studies investigating the exchanges between managers and salespeople (Ingram et al., 2005). However, in their study, LMX was not measured so it is difficult to determine whether the quality of the sales manager-salesperson relationship drove the effect of coaching on the salesperson’s attitudes and behaviors.

However, there are limitations to the use of LMX. First, there are some issues with the use of LMX as the theoretical foundation to explain effective coaching. LMX, or the quality of
the relationship, was not measured within extant coaching studies, therefore limiting its application. In addition, LMX is helpful in describing the quality of the relationship between the manager and subordinate but it does not help identify the behaviors that lead to high quality relationships (Gerstner and Day, 1997). Also, LMX posits that managers would give more support, feedback, and resources to those employees whom they have a higher quality relationship with. However, according to a recent survey (SMA, 2014), managers typically spend more time and conduct more coaching sessions with low-performing salespeople. It is unreasonable to suggest that managers have higher quality relationships with lower performers, leading managers to invest more time (resource) with low-performing salespeople. As a result, LMX may not be an appropriate theory to use to generalize the coaching process. Hence, additional research is needed to identify not only coaching behaviors that enhance coaching effectiveness but also how and why salespeople respond to those behaviors. Second, it is important to investigate the effect of coaching on outcomes associated with salespeople and sales managers (Badrinarayanan et al., 2015).

**METHODOLOGY**

A grounded theoretical approach (Glasser and Strauss, 1967; Strauss and Corbin, 1998) was used due to the limited literature on sales coaching and the exploratory nature of the study. A grounded theory is appropriate when the subject under investigation lacks theoretical guidance and when the meanings of constructs and the relationships between/among them are weak. (Creswell, 2012; Sousa and Hendrics, 2006; Strauss and Corbin, 1998). The reasons for the appropriateness of this method for the current study is twofold. First, while extant literature offers information on the process of sales coaching, current theoretical frameworks used in previous sales coaching studies (e.g., Onyemah, 2009) were not tested and do not provide an
explanation for the behaviors among coaches and salespeople. Second, previous studies do not identify the factors related to the manager and the salespeople that affect the coaching process or the relationship among those factors. For these reasons, grounded theory is an appropriate qualitative research design. Furthermore, we ensured that we interviewed managers who currently coach other salespeople, as well as salespeople who are currently receiving coaching from their manager. These participants’ views and experiences will help provide insight into the sales coaching phenomenon under investigation in this study.

Sample and Data Collection

Because the purpose of the study is to gain a better understanding of sales coaching, respondents were carefully chosen based on coaching experience. A theoretical sampling process was implemented to identify respondents who would contribute to the sales coaching phenomenon under investigation (O’Reilly, Paper, and Marx, 2012). This technique allows researchers to select informants who will maximize data diversity and contribute to theory development. To meet the standards of theoretical sampling in grounded theory, the subjects for the study will be sales managers who engage in coaching activities and salespeople who receive coaching from their managers. Specifically, we chose informants who had at least one year of coaching experience (given or received). Our sample consisted of managers who had between one and 12 years of coaching experience and salespeople who has been coached by a manager between six months and 19 years. Each manager coached other salespeople and each salesperson received coaching at least once a month.

The number of participants will depend on when theoretical saturation, i.e., no new information emerges from the data, occurs (Glaser and Strauss, 1967; O’Reilly, Paper, and Marx, 2012). As a results, twenty-five informants (12 sales managers and 13 salespeople) were
interviewed for this study. Subjects will be recruited from various sales organizations that will represent different industries. According to Creswell (2012, p. 111), “in a grounded theory study, the individuals may not be located at a single site; in fact, if they are dispersed, then they can provide important contextual information useful in the axial coding phase of research.” Due to limited resources, informants were identified through convenience sampling of five corporate partner firms that represent industries such as media, insurance, beverage, telecommunications, and B2B products/services.

Descriptive information of each participant (manager and salesperson) is presented in Table 1. To protect the privacy of each respondent and company, we identify respondents by their first name, position, and industry.

Table 1: Summary Descriptive of Respondents

<table>
<thead>
<tr>
<th>Respondent</th>
<th>Position</th>
<th>Years of Sales Experience</th>
<th>Industry</th>
<th>Gender</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Manager</td>
<td>10</td>
<td>Media</td>
<td>Male</td>
</tr>
<tr>
<td>2</td>
<td>Salesperson</td>
<td>12</td>
<td>Media</td>
<td>Male</td>
</tr>
<tr>
<td>3</td>
<td>Salesperson</td>
<td>1</td>
<td>Telecommunications</td>
<td>Male</td>
</tr>
<tr>
<td>4</td>
<td>Salesperson</td>
<td>3</td>
<td>Media</td>
<td>Male</td>
</tr>
<tr>
<td>5</td>
<td>Salesperson</td>
<td>1</td>
<td>Insurance</td>
<td>Female</td>
</tr>
<tr>
<td>6</td>
<td>Salesperson</td>
<td>2</td>
<td>Insurance</td>
<td>Male</td>
</tr>
<tr>
<td>7</td>
<td>Manager</td>
<td>14</td>
<td>B2B Products/Services</td>
<td>Male</td>
</tr>
<tr>
<td>8</td>
<td>Salesperson</td>
<td>12</td>
<td>Automotive</td>
<td>Male</td>
</tr>
<tr>
<td>9</td>
<td>Salesperson</td>
<td>1</td>
<td>Industrial</td>
<td>Male</td>
</tr>
<tr>
<td>10</td>
<td>Manager</td>
<td>13</td>
<td>Media</td>
<td>Male</td>
</tr>
<tr>
<td>11</td>
<td>Salesperson</td>
<td>4</td>
<td>Packaging</td>
<td>Male</td>
</tr>
<tr>
<td>12</td>
<td>Salesperson</td>
<td>19</td>
<td>Media</td>
<td>Male</td>
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<tr>
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<td>Manager</td>
<td>30</td>
<td>Insurance</td>
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<tr>
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<td>12</td>
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<td>Female</td>
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<td>15</td>
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<td>2</td>
<td>Industrial</td>
<td>Male</td>
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<td>15</td>
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<td>Female</td>
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<tr>
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<tr>
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<td>22</td>
<td>Manager</td>
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<td>Male</td>
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Table 1: Summary of Descriptive of Respondents (Continued)

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<th>Occupation</th>
<th>Gender</th>
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</thead>
<tbody>
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<td>Male</td>
</tr>
<tr>
<td>24</td>
<td>Manager</td>
<td>Female</td>
</tr>
<tr>
<td>25</td>
<td>Manager</td>
<td>Male</td>
</tr>
</tbody>
</table>

We conducted semi-structured interviews that ranged from 45 minutes to 90 minutes in length. All of the interviews were conducted either in-person at a location convenient to the respondent or over-the-phone. Prior to each interview, informants are given an interview consent form that explains the details of the interview including its purpose, confidentiality, and protection of their responses. Upon agreement, informants were asked questions related to demographic, job, and coaching. The interviews were audio-recorded and provided about 31 hours of content. The Interview protocol and questions are located in the appendix.

Data Analysis

Atlas.ti was used to analyze the interview data. Atlas.ti is a qualitative analysis software, similar to another popular program (NVivo) that is used by qualitative researchers, that allows researchers the ability to organize, classify, relate, and analyze qualitative information such as text, audio, and image data. Consistent with Strauss and Corbin’s (1988) grounded theoretical procedure, the data analysis was iterative such that each interview was reviewed throughout the process to identify emerging themes, which provided direction for subsequent interviews. The procedure for coding consists of three steps: open coding, axial coding, and selective coding. In open coding, we assessed the informant’s words and terminology in order to identify themes, or categories. The goal is to saturate the categories, i.e., until there is no addition of data. In axial coding, we explored the relationships between the categories identified in open coding, taking into consideration the condition, context and situation of the phenomenon. This recursive process of axial coding continues until no new data relationships are found. In selective code, we
integrated the categories with the goal of identifying a substantive theory of the phenomenon.

**RESULTS**

This section is focused around the three research questions aforementioned. The first set of questions are concerned with the factors related to the manager as coach and the factors related to the salesperson as coachee that impact the sales coaching process. Specifically, we identified various skills (adaptive coaching), behaviors (role-modeling, empathy/caring), and abilities (selling ability/knowledge) related to the manager that impacts how s/he coaches and his/her coaching effectiveness. We also identified different behaviors (coachability), preferences (communication style), and situation (current performance/experience/knowledge) related to the salesperson that impacts how the coachee responds to his/her coach. The final research question is concerned with the outcomes of sales coaching. The results showed several benefits of coaching (learning, problem-solving, goal clarity/obtainment, motivation) that indirectly impact the salesperson’s performance. Below we explicate the various sales managerial- and salesperson-related factors that impact sales coaching and the outcomes of coaching in sales as characterized and described the informants’ language and terminologies.

**Factors Related to the Manager that Affect Coaching**

**Role-Modeling**

Both respondent groups indicated the importance of role-modeling behaviors in which the sales manager coaches the salesperson through role-playing or through “in-the-field” activities. Role-playing served as a great way for sales coaches to practice new or previously
experienced selling scenarios with salespeople. This seemed especially more useful to new or inexperienced salespeople than it was for veteran representatives.

- “[The role-play] helps me feel more comfortable practicing with my manager before I actually sell in front of a customer (Respondent 5).”
- “[My manager] would ask me how he could help me … I would tell him situations that stumped me with a customer and he would role play with me and see how I would do (Respondent 6).”

However, some salespeople expressed that role playing in the office can be unrealistic and that it was more effective to have the sales coach in the field such as for “ride-along.” Ride-along is more effective and conducive to coaching for several reasons. First, it allows the sales manager to observe the salesperson in-action and provide immediate feedback versus having the salesperson talk about the sales call post-hoc (e.g., during role-play sessions). Thus, it allows the manager to provide better feedback and the salesperson to pivot in the moment. Second, it provides an opportunity for the sales manager and the salesperson to learn more about each other on a personal level. A number of sales respondents indicated that they were more comfortable sharing personal information during these private moments outside (versus inside) the office. This opportunity not only enhances the relationship between the sales coach and the salesperson, but it also allows the sales coach to better adapt to the salesperson based on his/her idiosyncrasies and it provides the coach a deeper understanding of the mechanisms that affect the performance of the salesperson. Third, it enhances salespeople’s attitudes towards the coach and the increases sales coachability (i.e., salesperson’s openness to coaching) when the sales coach is involved in the selling process (e.g., developing new business, needs analysis or discovery, negotiating with client, etc.) with the salesperson.
• “It’s like having a coach run with you when I was playing football … just having [my manager] be in the field with us was refreshing and motivating. You almost want to work harder and make him proud (Respondent 23).”

• “I like having my manager ride along with me … I prefer him to watch me interact with the customer and jump in when I am in trouble and then I can see how he does something that I couldn’t do and this way I can learn from it by seeing him do it. When we get back in the car, we usually talk about what I did well and what I could improve on (Respondent 9).”

**Adaptive Coaching**

Respondents emphasized the importance of adapting coaching behaviors to the individual salesperson during coaching encounters such as the salesperson’s style of communication and management style preferences. This is similar to adaptive selling, which is defined as the altering of sales behaviors based on the salesperson’s interpretation of the sales interaction with the customer and selling situation (Spiro and Weitz, 1990). Sales coaches reported that adapting to the salesperson made the salesperson much “easier to work with” and more “open” and “responsive” to coaching. Therefore, it appears that the more adaptive the sales coach the more coachable the salesperson becomes.

• “Everyone is different. I have a salesperson that wants to just get down to business when we get together. If there is something wrong or if there is something that he could do better, he wants me to just tell him directly rather than beating around the bush with him … I have another guy that is a little more sensitive. I have to feel him out first when we sit down. See how he is doing, what’s going on with his life, talk about family … then I can start going into discussing some of the issues with his performance (Respondent 17).”
• “Some people want a more hands-on type of manager, so I usually try to coach them by working more closely with them, talking to them more frequently, and spending more time with them. Other people want a more hands-off approach. So, we will usually meet formally in my office once every other week or month … if they want to see me to help them then I make myself available (Respondent 8).”

• “The more I get to know [the salesperson], the better I am able to coach that person … I can usually push someone harder or challenge them more just enough that he doesn’t get mad at me if I know the person better. Some people like to do things a certain way and I will try to adjust however I can (Respondent 2).”

• “I feel like my manager really knows me as a person … she knows how to coach me … depending on what’s going on with me in my life and how I like to talk and make decisions … I think she does a really good job as a coach with me (Respondent 20).”

• “I don’t like to be micromanaged … don’t need to be talked to every day… with [another salesperson] I know he would call them every day and see what they are doing and how he can help (Respondent 15).”

• “She knows me as a person and takes into account the things that are going on in my life when she coaches me … for example, if I am having a problem with my child, like he has been sick or something, then [my manager] knows not to question me too much and she understands that my performance this week is not representative of how I am as a salesperson (Respondent 5).”

Caring

Sales coaches reported the importance of showing salespeople that the coach “cares” about the individual salesperson. This is accomplished in various ways including listening
actively and empathetically, devoting time and attention to the salesperson, learning more about the salesperson on a personal (vs. professional) level, and selflessly serving the needs of the salesperson. Salespeople remarked that if they felt that the sales coach genuinely cared about the salesperson then the salesperson would be more likely to consider the coaching feedback, to share his/her thoughts and feelings, and to evaluate the coach favorably.

- “I think a good coach is someone who really cares about the salesperson. I feel like my manager really takes the time to help me whenever I need her help. She will always respond to my texts and I can always call her when I need to get a hold of her right away to help me answer a question, deal with a problem or whatever (Respondent 21).”
- “My manager is always there for me when I need her help. I can tell that she wants to help and cares about my success (Respondent 5).”
- “What makes her a good coach is that she listens to me … cares about me … makes time for me (Respondent 20).”
- “If I feel like [the manager] is just making me do something because it helps him or because his boss is telling him to do it then I just don’t like it. When that happens I just listen because I have to but I usually don’t want to make any changes especially if it is not going to help me close the sale or help me with my customer (Respondent 11).”
- “[Salespeople] need to know that you are there for them. You have to develop a relationship with them … show them that you care and want to see them succeed. If they succeed, then I feel like I have accomplished my goal as a coach … I don’t think about the bonuses (Respondent 25).”
Sales Knowledge

Sales knowledge appears to facilitate coaching in various ways. First, sales knowledge allows coaches to better assess, advise, and provide feedback during coaching sessions. Sometimes, it is more effective to ask salespeople questions so that they can come to the solution on their own. This appears to help salespeople feel more confident about and more accepting of the solution. Second, it allows sales managers to be better problem-solvers when salespeople run into problems with their clients. Some salespeople use their manager as a resource and seek the answers to issues that they might be facing in the moment, whereas others work with their managers to solve a particular problem. Sales coaches seem more effective the more collaborative they are with salespeople. Collaboration leads to new ideas, insights, and solutions, as well as, engagement and empowerment.

- “I am constantly reading new things about selling and if I find something that is useful then I will share that with my team … there is always something new for them to learn (Respondent 24).”

- “I can give better feedback to someone because I have learned a lot from my own sales experience and from listening to my best AEs [account executives] … so, I have multiple views that help me see a situation or problem differently ... (Respondent 2).”

Interestingly, salespeople’s evaluation of the “quality” and “effectiveness” of a sales coach were not influenced by the coach’s number of years of sales experience or performance as a salesperson (i.e., whether the manager was a top performing salesperson).

- “I was not the top 10 percent of the sales team when I was a salesperson but I was also not the bottom 10 percent. I think you have to be good at selling but not necessarily the best. A good coach will know how to deal with people, set goals, give feedback, break
things down, and educate … someone who is really good at sales does not translate to a really good manager (Respondent 1).”

- “I am the top rep in my unit and one of the top in my district … I don’t think my manager can teach me how to sell any better … He is just a resource … If I have a question that I need his opinion or or help to answer, then I reach out to him … he doesn’t really teach me how to sell (Respondent 3).”

- “It’s nice to know that my manager was a top salesperson … it shows that he knows what he is doing. As long as he can help me improve my selling then I think he is effective (Respondent 4).”

- “If what my manager recommends works and I see that it is helping me sell and be better then I trust him and his advice (Respondent 9).”

Factors Related to the Salesperson that Affect Coaching

Coachability

According to Shanahan, Bush, and Shanahan (2013), sales coachability is defined as “the degree to which salespeople are open to seeking, receiving, and using external resources to increase their sales performance in a personal selling context (p. 41).” Based on the results, sales managers are less likely to engage in coaching if she or he believes that the salesperson is not coachable, or very resistant to coaching. When sales managers were asked what they believed impacted a salesperson’s coachability, the sales managers provided reasons that were attributed to the salesperson. In other words, no sales manager felt that they had any influence on a salesperson’s coachability. However, when salespeople asked what made them resistant to a coach, the answers provided were attributed to both oneself and the manager.
• “If [the manager] tells us why he is telling us to do something and how it helps us and we can see how it is going to help our performance or our customers then I would be more open to it (Respondent 6).”

• “Sometimes people just don’t want to be coached … they don’t have the motivation to be coached (Respondent 12).”

• “I am more open to coaching if I feel like my manager really wants to help me and be there for me (Respondent 5).”

**Communication Style**

Respondents indicated that each person (sales manager or salesperson) has a preference for how to handle various situations and how to communicate and socialize with others. The results show that coaching is more effective when the sales manager adapts to the salesperson’s communication style and when the salesperson accepts and understands the sales manager’s communication style. Communication style is different than personality, which is enduring and does not change easily among different circumstances.

• “… He doesn’t coach me like he is a superior … he treats me like a peer and that affects the dynamic a lot (Respondent 15).”

• “I like to just have my manager tell me like it is but I know other people like to have rapport first, so [the manager] would ask them about their family, see how they are doing, how their day is, before they go into talking about issues with their performance and how to fix them (Respondent 14).”

• “I have a sales rep who wants to be involved in everything. He wants to talk through things with me and doesn’t like it when I talk at him. He is very process-oriented and wants to lay out exactly how he thinks from A to Z. I listen and ask questions. Then, I ask
him ‘well, have you thought about this and how this might affect that?’ and get him to really see a different perspective. He is more receptive if I do that then if I just told him that his way is problematic and that he should do what I am suggesting to fix it (Respondent 17).”

- “[My manager] is just that way … it doesn’t really bother me but I see how it is an issue with other people … like, it’s not the way that I would personally handle the situation but you just have to accept him for the way he is. I think that he really does care and want to help us but the way that he comes across could be thought of as mean (Respondent 20).”

**Current Performance/Experience/Knowledge**

The results showed that the salesperson’s levels of performance (low- vs. high-performer) and experience (new vs. veteran salesperson) influenced the frequency and duration of coaching given and received. It seemed that managers spent more time with low-performers and new agents. Interestingly, veteran salespeople who were high-performers wanted to be coached by their manager but the role that they required from the coach was different (coaching to improve performance vs. to solve complex problems). Managers seemed to be more reactive (vs. proactive) towards coaching by seeking to coach others with the objective of helping them “sell” or perform better.

- “I don’t have enough time to coach everyone every day. I am responsible for managing, planning, strategizing, training … I choose [who to coach more] based on who is going to give me the most ROI with my time (Respondent 10).”

- “I had more attention from my manager when in the beginning but now he just checks on me once in a while to see if I need him for anything (Respondent 11).”
• “I don’t really need [my manager] to coach me on how to sell … I come to him whenever I can’t figure something out and I need help solving a problem or just talk about the issue that I am having with my customer (Respondent 3).”

• “[My manager] spends more time with the new salespeople but it would be nice if he spends some more time with me …. to see what I can do to grow my [book of business] … it’s not fair that he is giving most of the accounts he gets to them when here he has the number guy on the team who has been loyal … I mean, it’s great that he leaves me alone and lets me do my thing but it would be nice still if he gives me the same attention and feeds me accounts once and a while too but it just doesn’t happen (Respondent 12).”

**Outcomes of Sales Coaching**

Beyond the obvious impact and benefit of sales coaching on salesperson’s performance, *effective* coaching sessions were described by respondents as those that not only helped them close more business but also helped salespeople learn new skills, knowledge, and abilities, solve problems, set and achieve goals, and be more motivated and inspired.

**Learning**

The results indicated that effective coaching sessions taught salespeople new knowledge, skills, and abilities (KSAs) that can directly or indirectly help them in their roles. It appeared that learning new KSAs was more prominent among less experienced representatives than it was among veteran salespeople. This may be due to the fact that sales coaches spent more time and sessions with newer/novice salespeople than veterans.

• “If I can learn something new that could help me be a better salesperson then that, to me, is a good coaching session (Respondent 21).”
Problem-Solving: The results showed that effective coaching sessions also helped salespeople solve problem(s) that they might be experiencing with a case or customer. Coaches also remarked that their job was to “help them think” through their problems. Some salespeople had a preference for collaborating with their managers to solve a problem while other salespeople wanted looked towards their managers to give them the solutions to their problems. If the problem was solved, or if a solution was provided that could directly or indirectly help them solve a problem, then respondents indicated that it was an “effective” coaching session.

- “[My manager] is good because he can help me see something differently … and help me figure out what I did wrong and how I can improve (Respondent 23).”
- “[My manager] works with me on issues that I might be having … like when I can’t close on a client who keeps stalling … when I had objections and didn’t know how to answer them … I usually leave the meeting knowing what I need to do next time (Respondent 15).”
- “My job as a coach is to let them figure things out for themselves … I will help them with their thought process by asking questions and directing them towards what I think is the solution but I won’t just give them the answer … You don’t want them to rely on you all the time and think that they can just call you for any answers. They need to be independent … but if they’re drowning then I am here to save them (Respondent 22).”

Goal Clarity/Obtainment

Results indicated that “formal” coaching sessions – for example, coaching session conducted on a weekly basis in the office between the manager and salesperson – involved a
discussion of weekly goals. In particular, coaches talked about what salespeople were supposed to do, what they have done, and what they will be doing moving forward. It seemed that salespeople were satisfied with a coaching session when the salesperson left the session with a clearer understanding of what hindered him/her from reaching his/her goal and what s/he needed to do in order to reach those goals.

- “… during the meeting we talk about the goals that we set last time and where she is at now and how I can help if she is not where she needs to be … I want to make sure that when my rep leaves the meeting she knows exactly what she needs to do the next time so that that problem that she was having does not happen again (Respondent 18).”

**Motivation/Inspiration**

Salespeople indicated that an effective coaching session was one that left them motivated and inspired. Salespeople indicated that when they felt motivated and inspired, they were driven to implement the coach’s recommendations and more optimistic with their future performance.

- “I would consider it an effective coaching session when I leave really excited and motivated to get things done … I am just the type of person that needs [my manager] to really push me and motivate me (Respondent 5).”

- “A coaching session could be effective even if it just gets me energized afterwards … It’s like what a football coach does with his team … to just get them motivated (Respondent 23).”

**Relationship Between and Among the Factors**

Based on the interview results, we can build a model of coaching (see Appendix E) that integrates perspectives from both the manager as coach and the salesperson as coachee. From the
manager’s perspective, coaching is a two-step process: In the first step, the manager makes a decision to engage in coaching (i.e., whether to start coaching or whether to coach more or less frequently) with a salesperson. We identified three factors that affect the manager’s decision to coach: The manager’s perception of the salesperson’s coachability, the salesperson’s current level of performance, and the salesperson’s selling experience. In the second step, the manager engages in coaching by adopting two broad coaching behaviors: role-modeling and helping behaviors. Role modeling behaviors include, for example, active and empathetic listening, asking questions, providing feedback, showing/teaching, observing in-the-field (e.g., ride-along, listening-in on calls). Helping behaviors involve, for instance, providing resources (e.g., leads, information, input), giving immediate attention to salesperson’s request(s), sacrificing/making time to help, and selling with with the salesperson. The manager’s skills and behaviors changes the effectiveness of the coaching behavior on the salesperson. These skills and abilities include the manager’s knowledge, skills, and ability with selling, as well as his ability to adapt to the salesperson’s communication style and management preferences. The quality of the manager’s ability to help and be a role-model determines the effectiveness of the coaching session on the salesperson. Effective coaching sessions will indirectly result in various outcomes that drive sales performance such as learning a new selling knowledge, skill or ability, solving a problem that the salesperson might be facing, helping the salesperson establish goals and holding him/her accountable, and motivating and inspiring the salesperson to perform. These outcomes of sales coaching directly impact the salesperson’s performance.

From the salesperson’s perspective, the effectiveness of the manager’s coaching efforts (behaviors) on his/her sales performance will be contingent on the salesperson’s level of trust towards the manager, which influences the salesperson’s level of coachability, or openness to
seeking and receiving the manager’s coaching. The salesperson forms trust for the manager in several ways. For instance, the salesperson will trust that the manager is there to help the salesperson succeed when the salesperson perceives that the manager understands the salesperson, i.e., understands the salesperson as an individual/person and understands the salesperson’s situation and perspective. This is developed when the manager exhibits coaching behaviors that leads the salesperson to perceive that the manager is empathic, caring, and adaptive to the salesperson. Another way in which the salesperson trusts the manager is by trusting that the manager is providing feedback and recommendations that will help the salesperson perform at a higher level. This trust towards the manager is contingent on the salesperson’s confidence in the manager’s selling knowledge, skills, and ability.

CONCLUSION

This paper contributes to the limited sales coaching literature in several different ways. First, this paper answers the call for research (Badrinarayanan et al., 2015; Onyemah, 2009) to identify the factors related to the manager and the salesperson that affects the coaching process. This paper establishes a sales coaching model that integrates the perspectives of both the sales manager (as coach) and the salesperson (as coachee). To our knowledge, no other extant coaching study in a business (e.g., managerial, executive, or sales) or non-business (e.g., athletic) context offers this type of model. The conceptual model of sales coaching that is developed in this paper is grounded in the phenomenon and offers insight into the factors (i.e., perceived salesperson’s coachability, level of sales experience, and current performance) that affect the sales manager’s decision to engage in (or to conduct more of) coaching with a salesperson and how and why the coaching behaviors that the sales manager exhibits affect the salesperson’s performance. Onyemah (2009) has called for research on “what characteristics distinguish the
coaching effectiveness of sales managers (p. 954)?” Our model identifies two categories of behaviors that coaches must adopt to effectively impact performance: role-modeling behaviors and helping behaviors. Researchers have also found that coaching is more effective when it is adapted or customized to the individual based on such characteristics as age, gender, career stage, and coachability (Chonko, Roberts, and Jones, 2006, Cron, 1984, Onyemah, 2009). In addition to these characteristics, the results show that coaching is more effective when the sales manager adapts specifically to the salesperson’s communication style and management preferences. This information is important because it provides coaches with information on how to customize coaching to the individual by selecting the best methods that the salesperson would respond to best. In addition, consistent with Cron (1984), we also find that the role and the coaching behaviors of the sales manager changes depending on the career stage of the salesperson such as between new and experienced sales reps. For example, we find that among high performing salespeople sales managers exhibit more helping behaviors (e.g., providing resources, helping to solving problems, etc.) versus among lower performing salespeople where sales managers are more likely to exhibit role-modeling behaviors (e.g., observing, showing/teaching, etc.). Future research should examine whether salespeople vary in attitudes towards the sales coach and the coaching sessions depending on such factors.

Second, our model provides insight into the role of trust in sales coaching. Researchers have studied trust between sales manager and salesperson extensively (e.g. Agnihotri and Krush, 2015; Flaherty and Pappas, 2000; Lagace, 1991; Rich). Trust has been found to increase job satisfaction, lower role conflict, and job performance. Moreover, Flaherty and Pappas (2000) provides suggestions on how managers can establish more trust with their salespeople in the workplace. This research extends the extant research by offering suggestions on the coaching
behaviors that salespeople evaluate to form a judgement towards the level of trust that they have with their sales coach. By understanding the behaviors and activities that coaches can show to establish trust with their coachee, the sales coach would be able to coach more effectively.

Furthermore, is it not clear whether trust plays a mediating or a moderating role between coaching behaviors (e.g., role–modeling) and performance (Rich 1998). In other words, is trust developed through the sales manager’s coaching actions (role-modeling behaviors) or is the coaching activities and behaviors futile unless trust is established beforehand? Our results suggest that trust plays a mediating role, that is, that salespeople perceive higher levels of trust when sales managers exhibit genuine helping behaviors such as providing resources and giving immediate attention to the needs of the salesperson. The results also suggest that helping behaviors lead to higher levels of perceived trust among salespeople. These helping behaviors are consistent with the behaviors among servant leaders, or those managers that adopt a servant leadership style (Jaramillo et al., 2009). Future research should examine whether there is a positive correlation between a manager’s perceived servant leadership style and perceived trust towards the manager. In addition, researchers should examine whether there is less trust among the other types of leadership style behaviors (transactional and transformational) that continues to receive much attention among academicians. This is important because the biggest question that has yet to be answered is which leadership style is more effective. In the context of sales coaching, it is possible that servant leader behaviors are more effective than the other types of leader behaviors because it evokes greater levels of trust among the coaches. Moreover, one of the informants remarked, “I have to be there for the coaching sessions each week with my manager but I just don’t think that whatever he says I should do is going to help me so I just sit back and let him talk to me and tell me whatever it is that I need to do so that I can leave…” This
suggests that the sales coach may think that the salesperson is coachable and that the salesperson trusts the sales manager’s help as a coach but, in fact, the salesperson does not trust the manager. Future research should investigate whether such a gap exists and how it impacts coaching process.

The impetus for this research was due to the lack of theoretical frameworks and the lack of understanding the of various factors and its relationship that affect the sales coaching process. The existing theories used in coaching research does not help researchers explain the how and why coaching is effective at increasing sales performance. In a review of the literature, three theoretical frameworks exist. First, within the limited sales coaching literature, LMX was used to help explain the impact of sales coaching on salespeople’s attitudes and behaviors (Onyemah, 2009). LMX argues that the better the quality of the relationship between the manager and subordinate the more resources the manager provides the subordinate. However, research shows that sales managers spend more time, energy, and resources coaching low-performers and new salespeople (SMA, 2014). It is unreasonable to believe that the reason sales managers spend more time and resources on new and low-performing salespeople is because the sales manager has a better quality relationship with those individuals than the salespeople who are more experienced and high-performing. In fact, one of the informants, the top-performing salesperson within his company who stated that he and his manager have a great relationship also mentioned that “I want my manager to spend more time with me … but he just doesn’t have much time to give me because he is focused on the new reps which I understand … he is a busy guy … I would appreciate more leads … they are given to the new salespeople to help them build their pipeline but I am better at closing them.” Our results do support parts of LMX such that salespeople who felt a stronger personal relationship with their manager were more willing to
share information and, more importantly, evaluated the sales manager as a coach more favorably. While there is some merit to understanding the quality of the relationship between sales manager and salesperson, LMX does identify the specific behaviors that enhances the relationship quality between coach and coachee.

Second, managerial coaching researchers have used expectancy theory (Vroom, 1964) to explain the motivational drivers that influence managers to coach (Pousa and Mathieu, 2010). Expectancy theory is a theory of motivation based on the expectation that successful performance of a task leads to desired rewards. Expectancy theory helps us explain why sales managers who are starving for time would spend that time coaching low performers and new salespeople. Sales managers are evaluated, among other criteria, by the percentage of their salesforce that make quota. Therefore, it makes sense for sales managers to devote more coaching time to those salespeople who are underperforming. However, expectancy theory does not explain how and why coaching behaviors increase sales performance.

Based on the interview results, the theory of emotional intelligence may be a more appropriate theory to apply. Emotional intelligence has been studied in marketing and more recently in sales (e.g., Kidwell et al., 2013; McFarland, Rode, and Shervani, 2016). Salovey and Mayer (cited in Mayer & Cobb, 2000), define emotional intelligence as “the capacity to process emotional information accurately and efficiently, including the capacity to perceive, assimilate, understand, and manage emotion (p. 165).” Popularized by Goleman (1995), the author identified emotional competencies and divided emotional intelligence into “Personal” and “Social” competencies. Within personal competency, emotionally intelligent people possess skills of self-awareness and self-regulation (or self-control). Self-awareness is the ability to recognize one’s emotion when it occurs. The key is not to think that the emotion is good or bad.
but rather whether is appropriate or inappropriate for the situation. By being aware of one’s emotion, an individual can accurately assess one’s current state to understand why the emotion occurred. Self-awareness helps improve one’s self-confidence. Self-regulation is ability to manage those feelings and emotions. Self-control is a critical aspect of managing one’s emotions. Sales managers who are emotionally intelligent are able to recognize emotions that they experience and are able to regulate those emotions so that it does not manifest in toxic behaviors (e.g., yelling) that negatively impact their coaching behaviors and interactions with salespeople. The ability to control those emotions are key in the ability to adapt such as adapting to the salesperson’s communication style and management preferences. We have a tendency to treat others the way we want to be treated – when this is incongruent, we have a tendency to feel frustration. The ability to adapt to another person’s style and preference requires self-control. On the other hand, social competency in emotional intelligence is about how we understand others and their emotions and how we respond towards them as a result. Within social competency, emotionally intelligent people possess empathetic and social skills. Empathy is the awareness of other people’s emotions and the ability to understand their point of view. Sales managers need to be empathetic in order to effectively listen and provide feedback. Many of the informants who felt their manager was a great coach remarked that their manager “understood” them. Informants who were resistant to coaching said that the manager “did not understand them … better if he would actually go out to the field with us for even one day so he can see what I actually have to go through … because some of the things he tells me to do I am like, uh, no, that is not going to work … [he] doesn’t fully see my perspective.” Social skills encompass any skills that facilitate interaction and communication with others. Emotionally intelligent people are able to recognize
various social cues when interacting and communicating with others, thereby being perceived as someone who is a good listener, trustworthy, and charismatic.

LIMITATIONS

While the interview informants represented several industries to increase generalizability, there are limitations that must be recognized. First, the results reflect sales managers and salespeople who are in B2B sales. It’s possible that the coaching may be different among B2C salespeople. Second, the data reflected salespeople in field positions. With the rise of inside salesforce among some sales organizations in order to reduce costs, it is important to determine how coaching changes between the two different types of positions. Third, all of the salespeople are involved with consultative type of selling. Coaching may differ among a salesforce in which the dominant style of selling is transactional or relational.
REFERENCES


ESSAY TWO:

SALES COACHING EFFECTIVENESS: SCALE DEVELOPMENT AND VALIDATION

Although research on managerial coaching behaviors is sparse, the coaching scales that have been created lack content validity, and therefore, cannot be applied in a sales setting without taking the proper steps to develop and validate a sales coaching scale for the new selling environment. In particular, the two predominate coaching scales were either developed using a different sample or created from coaching behaviors observed in a different context. Leading salespeople requires skills and behaviors that are different than those managing non-salespeople in a non-sales context (Deeter-Schmelz, Goebel, and Kennedy, 2008; Ingram et al., 2005). Therefore, the skills and behaviors of a sales coach is presumed to be slightly different than those required of a managerial coach (i.e., a line manager that coaches subordinates). This paper aims to develop and validate a sales coaching effectiveness scale (SCES) that measures the coaching skills and behaviors of effective sales coaches.

Sales practitioners acknowledge the benefits of sales coaching to increase sales and to the overall firm effectiveness. Research from the Corporate Executive Board (CEB; 2014) indicates that salespeople achieve an average of 19% more sales towards their goal when they have a “highly effective coach.” In fact, the CEB reports that sales representatives who receive just three hours of coaching a month exceed their goals by 7% and increase their close rates by 70%, thereby generating an average 25% more revenue for firms. According to the International Coach Federation (ICF; 2009), effective coaching results in a return of 7 times the initial investment.
Indeed, effective coaching has a direct, measurable impact on key performance indices. Unfortunately, while sales firms are beginning to devote more resources towards coaching, the biggest challenge among coaching programs is the “lack of training for managers” (Richardson, 2016).

In order to train, evaluate, and develop coaches, sales organizations need to measure the key coaching skills and behaviors that contribute to the overall effectiveness of their coaches. In their review of the sales coaching literature, Badrinarayanan et al. (2015) asserts that “as no instruments have been created…the development of a sales coaching competence scale would greatly help in the assessing of salespeople’s evaluation of their coaches’ effectiveness as well as a coach’s self-evaluation of their coaching skills and abilities” (p. 1103). The topic of conceptualizing and measuring effective coaching has attracted some attention in the academic management literature (Beattie et al., 2014; Ellinger, Hamlin, and Beattie, 2010; Hagen and Peterson, 2015; McLean et al., 2005). Two dominant scales measuring coaching behaviors and skills have been developed and are primarily used by management academics. However, a review of these scales will reveal several limitations with regard to the conceptualization, development, and measurement of effective coaching that restricts their use within the sales context.

First, previous researchers have conceptualized an effective coach as one who facilitates knowledge. However, we argue that it fails to capture the interpersonal and intrapersonal aspects of coaching that are necessary for effective coaching. In this paper, we adapt Cote and Gilbert’s (2009) as well as Badrinarayanan et al.’s (2015) conceptualization of coaching.

*Effective sales coaching* is defined as the consistent, individually-focused application of integrated professional, interpersonal, and intrapersonal knowledge to improve a salesperson’s competence, confidence, and performance in sales task-related and organization-related goals and objectives.
Second, previous scales were often developed using an inappropriate sample; the items were generated from interviews with non-sales managers. In this same vein, it is appropriate to investigate this phenomenon not only from the sales managers’ (i.e., coaches’) perspective, but also from the salesperson’s perspective as research on perceptual (in)congruity has shown that sales managers and salespeople vary in their perceptions that have detrimental effects on job-related outcomes (Evans et al., 2002). In other words, what managers think are appropriate behaviors, skills, and abilities of effective coaching may not be congruent with those of salespeople.

Third, some of the scale items were derived from coaching behaviors of athletic coaches within the sports domain, which has raised validity concerns when these scales were tested in different contexts (Hagen and Peterson, 2015). Leading and coaching salespeople requires skills and behaviors that are different from those managing non-salespeople in a non-sales context (Deeter-Schmelz, Goebel, and Kennedy, 2008; Ingram et al., 2005). Therefore, it improves the face validity of a measurement scale when the same population that was used to create the scale is then tested with that scale (i.e., B2B professional salespeople).

In this study, we investigate the dimensions of the SCES construct within the B2B professional sales context. In three different studies, we develop and validate a three-dimensional, 16-item scale that can be used by sales coaches to evaluate their performance from the perspective of their sales force. This benefits the sales managers in a couple of ways. First, it will allow managers to pinpoint and improve upon specific areas of weaknesses that potentially compromise the overall effectiveness of coaching. Second, it will help sales managers identify the coaching needs of each salesperson and, thus, adapt to each salesperson accordingly.
LITERATURE REVIEW

Coaching Skills and Behaviors

Empirical studies of managerial coaching skills and behaviors is limited. In a qualitative study of 12 non-sales managers (i.e., senior and mid-level), Ellinger and Bostrom (1999) conducted in-depth interviews to identify effective coaching behaviors that facilitate learning among employees. The authors found 13 distinct behaviors that were categorized as either empowering or facilitating behaviors. Empowering behaviors included the following: (1) questioning framing to encourage employees to think through decisions; (2) being a resource – removing obstacles; (3) transferring ownership to employees; and (4) holding back – not providing the answers (Ellinger and Bostrom, 1999, p. 758). The facilitating behaviors included the following: (1) providing feedback to employees; (2) soliciting feedback from employees; (3) working it out together – talking it through; (4) creating and promoting a learning environment; (5) setting and communicating expectations – fitting into the big picture; (6) stepping into others’ position to shift perspectives; (7) broadening employees’ perspectives – getting them to see things differently; (8) using analogies, scenarios, and examples; and (9) engaging others to facilitate learning (Ellinger and Bostrom, 1999, p. 758).

Similarly, Beattie (2006) explored the managerial coaching behaviors that facilitate learning within organizations by conducting field studies of two different non-profit (charitable) organizations in Scotland. The study revealed 22 managerial coaching behaviors that were categorized into nine categories: (1) caring – support, encouragement, approachable, reassurance, commitment/involvement, empathy; (2) informing – sharing knowledge, (3) being professional – role model, standard-setting, planning and preparation; (4) advising – instruction, guidance, counseling; (5) assessing – feedback and recognition, identifying developmental
needs; (6) thinking – reflective or prospective thinking, clarification; (7) empowering – delegation, trust; (8) developing others – developing developers; and (9) challenging – challenging (Ellinger, Hamlin, and Beattie, 2008; Hamlin, Ellinger, and Beattie, 2006).

In the sales context, Rich (1998) content analyzed popular press articles to identify behaviors and activities of effective sales coaches. The authors found three common characteristics that distinguish effective sales coaches: feedback, role modeling, and trust. First, sales coaches must provide praise and recognition to their salespeople so that they feel appreciated. Second, sales coaches must lead by example and be role models for their salespeople. Third, sales coaches must create and foster an environment in which salespeople trust and respect the manager, thus promoting open communication in which the salesperson is more willing to listen and respond to the manager’s coaching.

Coaching Scales

There are two predominant schools of thought (or approaches) in the managerial coaching literature regarding the determination of an effective coach (Hagen and Peterson, 2015): a behavior-based approach (Ellinger, Ellinger, Keller, 2003) or a skills-based approach (McLean et al., 2005). A behavior is any outward, observable action whereas a skill is “more attitudinal, cognitive, and affective in nature … [that] are related to aptitude and ability” (Hagen and Peterson, 2015; p. 117). Please refer to figure 1 for more details on both scales.

In the behavior-based camp, “managerial coaching is seen exclusively as a behavioral indicator, identified through specific behaviors exhibited by managers” (Hagen and Peterson, 2015). Ellinger, Ellinger, and Keller (2003) created a scale – hereafter referred to as the Behavioral Coaching Scale (BCS) – to measure coaching behaviors that facilitates learning. The Behavioral Coaching Scale reflected eight themes: (1) using analogies, scenarios and examples;
(2) broadening employees perspectives – getting them to see things differently; (3) providing feedback to employees; (4) soliciting feedback from employees, (5) being a resource – removing obstacles, (6) question framing to encourage employees to think through issues; (7) setting and communicating expectations – fitting into the big picture; and (8) stepping into others to shift perspectives (Ellinger, et. al, 2003, p. 443-444).

In the skilled-based camp, the scale to measure coaching skills was developed by McLean et al. (2005) and further validated by Park, McLean, and Yang (2008), referred hereafter as the Coaching Skills Scale (CSS). The CSS scale reflects four dimensions: (1) open communication, (2) team approach, (3) value people, (4) accept ambiguity. Although the CSS scale consists of items that are behaviorally based, it does include “items that are based more on perceptions of skill-based or knowledge-based approaches to coaching” (Hagen and Peterson, 2015; p. 118).

<table>
<thead>
<tr>
<th>BCS: Behavioral Coaching Scale (Ellinger et al., 2003)</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Dimension 1: Empowering Behaviors</td>
</tr>
<tr>
<td>1. My manager frames questions to encourage me to think through issues</td>
</tr>
<tr>
<td>2. My manager offers himself as a resource and removes obstacles for me</td>
</tr>
<tr>
<td>3. My manager transfers ownership to us</td>
</tr>
<tr>
<td>4. My manager holds back and does not provide me answers</td>
</tr>
<tr>
<td>• Dimension 2: Facilitating Knowledge Behaviors</td>
</tr>
<tr>
<td>1. My manager provides feedback to me</td>
</tr>
<tr>
<td>2. My manager solicits feedback from me</td>
</tr>
<tr>
<td>3. My manager and I work it out together – talking it through</td>
</tr>
<tr>
<td>4. My manager creates and promotes a learning environment</td>
</tr>
<tr>
<td>5. My manager sets and communicates expectations – fitting into the big picture</td>
</tr>
<tr>
<td>6. My manager steps into my position to shift perspectives</td>
</tr>
<tr>
<td>7. My manager broadens my perspectives – getting me to see things differently</td>
</tr>
<tr>
<td>8. My manager uses analogies, scenarios, and examples</td>
</tr>
<tr>
<td>9. My manager engages me to facilitate learning</td>
</tr>
</tbody>
</table>

Figure 1: BCS Versus CSS Scales (Continued on Next Page)
CSS: Coaching Skills Scale (McLean et al., 2005)*

- **Dimension 1: Open Communication**
  1. When asked to share his feelings, my manager is comfortable.
  2. In difficult work situations, my manager is open and candid with his opinion.
  3. In conversations with others, my manager shares his feelings openly.
  4. When developing relationships, my manager openly shares his personal values.
  5. When asked about his work experiences, my manager willingly discusses them.

- **Dimension 2: Team Approach**
  1. When asked to volunteer for work-related projects, my manager chooses team tasks.
  2. My manager generally enjoys working on tasks I work with others to complete.
  3. As part of a workplace group, my manager prefers to work for group consensus.
  4. When a decision is to be made, my manager prefers to participate with others.
  5. When thinking of ways to achieve objectives, my manager seeks input from others.

- **Dimension 3: Value People**
  1. In decision making, my manager emphasizes feelings over logic.
  2. In discussions with others, my manager focuses on the needs of the individuals.
  3. When facilitating meetings, my manager leaves time for relationship building.
  4. In the workplace, my manager looks for connections with others.
  5. In his work my manager tends to focus more on the people.

- **Dimension 4: Accept Ambiguity**
  1. My manager views conflict as constructive.
  2. When others are making career decisions, my manager stresses risk taking.
  3. When seeking solutions to problems, my manager likes to try new solutions.
  4. My manager finds conflict in the workplace exhilarating.
  5. When working with others, my manager asks questions for which there are many

*as cited by Hamlin, Ellinger, and Beattie (2006)

**Need for Sales Coaching Scale**

In an effort to identify the reliability and content validity of the BCS and CSS scales, as well as, to compare each scale’s ability to measure effective coaching, Hagen and Peterson (2015) concurrently tested the scales to a population of managers and employees. Results showed that “neither scale is perfectly reliable and valid” (Hagen and Peterson, 2015; p. 114).

There are several possible explanations. First, the items in the BCS scale were created based on the results of Ellinger and Bostrom’s (1999) in-depth interview with 12 managers who
may or may not have coaching experience with a line employee. In Hagen and Peterson’s (2015) study, the scale was tested using a sample of line managers with coaching experience and by employees who had experiences being coached. Second, the items in the CSS scale were derived from behaviors of athletic coaches in sports contexts. The differences in contexts (business vs. sports) may also have contributed to the lack of reliability and validity. Third, both managerial coaching scale items were generated from the perspective of one party (the manager) in the coaching dyad. Research on perceptual incongruity has shown that managers and salespeople vary in their perceptions regarding various factors and outcomes (Evans et al., 2002). Therefore, the possible validity issues may derive from the fact that the items do not necessarily reflect what employees think comprise of an effective coach. For these reasons, Hagen and Peterson (2015) have called for future research to “further scale development … within multiple contexts and multiple areas … with the input of team leaders and their reports on the topic of multiple dimensions, and from the perspective of both a skills-based and behaviorally-based approach (p. 129).” In addition, Badrinarayanan et al. (2015) asserts that “as no instruments have been created…the development of a sales coaching competence scale would greatly help in the assessing of salespeople’s evaluation of their coaches’ effectiveness as well as a coach’s self-evaluation of their coaching skills and abilities (p. 1103).” This paper answers these calls for research to develop a scale coaching effectiveness scale.

It is important to note that managerial coaching is similar yet different from professional sales coaching. The primary distinction between sales coaching and other types of coaching is the “coachee” (the individual being coached). Sales coaches coach salespeople, whereas athletic coaches coach athletes and teams, executive coaches coach top management team members, and managerial coaches coach subordinates. It is important to note that although line managers coach
subordinates, the differences between subordinates (non-sales employees) and salespeople may cause managerial coaching scales to inadequately or insufficiently capture the coaching skills and behaviors of sales managers.

Specifically, the unique characteristics of product/service being sold and the selling environment impact not only the personal characteristics of the salespeople, but also the way in which they should be led, managed, trained and coached (Ingram et al., 2005). According to Ingram et al. (2005), leading salespeople presents managerial challenges that are usually not experienced among managers within non-sales firms. First, self-leadership is more prominent among salespeople as they usually operate in “social, physical and social isolation from other employees in the organization (Ingram et al., 2005, p. 138).” Second, as salespeople operate as boundary spanners who must work effectively with individuals and groups both within and outside the organization, sales managers are uniquely challenged to help salespeople balance the demands derived from these various constituents (Ingram et al., 2005). Third, salespeople’s (versus non-salespeople’s) compensation is tied to short-term (e.g., incentive-based) as well as long-term performance metrics (e.g., customer satisfaction, retention), with the majority of compensation tied to short-term gains (Ingram et al., 2005). Taken altogether, these differences between salespeople’s and non-salespeople’s job environment and responsibilities present different challenges that are not necessarily faced among non-sales managers (Ingram et al., 2005). As a result, coaching salespeople will require additional skills and abilities that may not be captured from previous (non-sales) coaching scales.
METHODOLOGY

The Scale Development Process

We develop, measure, and validate the sales coaching effectiveness scale (SCES) across three different studies. Following Churchill’s (1979) approach and other scale-development studies (Walsh and Beatty, 2007), Study 1 was focused on generating items for the SCES scale through in-depth interviews with B2B sales managers and salespeople and who have experience with coaching within the United States. The sample respondents represented several different industries. Study 2 was focused on item reduction through scale refinement. Study 3 was focused on validating the reduced scale on a new sample of respondents. Figure 2 summarizes the scale development process (Walsh and Beatty, 2007).

<table>
<thead>
<tr>
<th>Study 1</th>
<th>Study 2</th>
<th>Study 3</th>
</tr>
</thead>
<tbody>
<tr>
<td><em>Scale Generation and Initial Purification</em></td>
<td><em>Scale Refinement</em></td>
<td><em>Scale Validation</em></td>
</tr>
<tr>
<td>• Semi-structured in-depth interviews</td>
<td>• Exploratory factor analysis</td>
<td>• Confirmatory factor analysis</td>
</tr>
<tr>
<td>• Generate initial pool of items</td>
<td>• Refined scale with 16 items for next stage</td>
<td>• Assss content validity (inter-item correlations), discriminant validity, and convergent validity</td>
</tr>
<tr>
<td>• Assessed readability</td>
<td></td>
<td>• Assessed second-order model</td>
</tr>
<tr>
<td>• Expert judges</td>
<td></td>
<td>• Assessed nomological validity (hypothesized relationships)</td>
</tr>
<tr>
<td>o Assessed face and construct validity</td>
<td></td>
<td>• Final SCES scale of 16 items</td>
</tr>
<tr>
<td>o Check of categorization</td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Interrater reliability</td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Produced 42 items for next stage</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

| Qualitative Inquiry and Initial Purification | Purification and Refinement | Final Refinement and Validation |

Figure 2: Scale Development Process
Study 1 – Item Generation

Semi-structured interviews were conducted among 25 B2B informants (12 sales managers and 13 salespeople). The purpose of the depth interviews was to uncover different dimensions of an effective sales coach that could be further investigated in the quantitative study. Each salesperson received coaching at least once a month, with a total time of coaching interaction ranging between six months and 19 years. Each sales manager had between one and 12 years of experience directly coaching salespeople. Respondents ranged in age from 23 to 45 (mean=31.5), 71 percent were male, and an average of 8.9 years of sales experience. Informants were identified through convenience sampling of five corporate partner firms that represent different industries: media, insurance, beverage, telecommunications, and B2B products/services. Descriptive information of each participant is presented in Table 2.

Table 2: Summary Descriptive of Respondents (Study 1)

<table>
<thead>
<tr>
<th>Respondent</th>
<th>Position</th>
<th>Years of Sales Experience</th>
<th>Industry</th>
<th>Gender</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Manager</td>
<td>10</td>
<td>Media</td>
<td>Male</td>
</tr>
<tr>
<td>2</td>
<td>Salesperson</td>
<td>12</td>
<td>Media</td>
<td>Male</td>
</tr>
<tr>
<td>3</td>
<td>Salesperson</td>
<td>1</td>
<td>Telecommunications</td>
<td>Male</td>
</tr>
<tr>
<td>4</td>
<td>Salesperson</td>
<td>3</td>
<td>Media</td>
<td>Male</td>
</tr>
<tr>
<td>5</td>
<td>Salesperson</td>
<td>1</td>
<td>Insurance</td>
<td>Female</td>
</tr>
<tr>
<td>6</td>
<td>Salesperson</td>
<td>2</td>
<td>Insurance</td>
<td>Male</td>
</tr>
<tr>
<td>7</td>
<td>Manager</td>
<td>14</td>
<td>B2B Products/Services</td>
<td>Male</td>
</tr>
<tr>
<td>8</td>
<td>Salesperson</td>
<td>12</td>
<td>Automotive</td>
<td>Male</td>
</tr>
<tr>
<td>9</td>
<td>Salesperson</td>
<td>1</td>
<td>Industrial</td>
<td>Male</td>
</tr>
<tr>
<td>10</td>
<td>Manager</td>
<td>13</td>
<td>Media</td>
<td>Male</td>
</tr>
<tr>
<td>11</td>
<td>Salesperson</td>
<td>4</td>
<td>Packaging</td>
<td>Male</td>
</tr>
<tr>
<td>12</td>
<td>Salesperson</td>
<td>19</td>
<td>Media</td>
<td>Male</td>
</tr>
<tr>
<td>13</td>
<td>Manager</td>
<td>30</td>
<td>Insurance</td>
<td>Male</td>
</tr>
<tr>
<td>14</td>
<td>Salesperson</td>
<td>12</td>
<td>Media</td>
<td>Female</td>
</tr>
<tr>
<td>15</td>
<td>Salesperson</td>
<td>2</td>
<td>Industrial</td>
<td>Male</td>
</tr>
<tr>
<td>16</td>
<td>Manager</td>
<td>8</td>
<td>Insurance</td>
<td>Male</td>
</tr>
<tr>
<td>17</td>
<td>Manager</td>
<td>10</td>
<td>Automotive</td>
<td>Female</td>
</tr>
<tr>
<td>18</td>
<td>Manager</td>
<td>15</td>
<td>Media</td>
<td>Female</td>
</tr>
<tr>
<td>19</td>
<td>Manager</td>
<td>12</td>
<td>Insurance</td>
<td>Male</td>
</tr>
<tr>
<td>20</td>
<td>Salesperson</td>
<td>4</td>
<td>Media</td>
<td>Female</td>
</tr>
</tbody>
</table>
Each interview ranged between 45 minutes and 90 minutes in length. All of the interviews were conducted either in-person at a location convenient to the respondent or over-the-phone. Prior to each interview, informants were given an interview consent form that explains the details of the interview including its purpose, confidentiality, and protection of their identity. Upon agreement, informants were asked questions related to demographic, job, and coaching. The interviews were audio-recorded and provided about 31 hours of content. All of the participants were asked the following questions, among others:

- In your opinion, what makes an effective coach?
- How do you determine that you (your manager) are (is) an effective coach?
- Think about the last time that you coached a salesperson (you were being coached by your manager). Think about a “good” (successful) coaching session. Describe the coaching session and explain what made it a successful session.

Atlas.ti was used to analyze the interview data. Atlas.ti is a qualitative analysis software, similar to another popular program (NVivo) that is used by qualitative researchers, that allows researchers the ability to organize, classify, relate, and analyze qualitative information such as text, audio, and image data. The responses were carefully assessed and then assigned to categories based on similarity of the representing aspects of an effective sales coach. The process initially yielded three categories: Level of involvement, adaptability, and rapport/trust. Level of involvement refers to the degree of engagement (e.g., observation vs. participation) in the sales coaching process. Adaptability refers to the sales manager’s ability to adapt to the salesperson’s...
communication, management and coaching style, preference, and need. Rapport/trust refers to the personal and professional relationship between the sales manager and salesperson.

Based on the qualitative data, 46 items were developed that appeared to capture the essence of points made by the respondents. Another marketing academic assessed the readability of the 46 items. Next, a panel of judges, consisting of three B2B salespeople from different firms and industries, were recruited to assess the face validity and content validity of the items. The judges were given the conceptual definition of an effective sales coach and the three dimensions. The judges were asked to rate the 46 items as either “very applicable,” “somewhat applicable,” or “not applicable” (Shimp and Sharma, 1987; Tian, Bearden, and Hunter, 2001; Walsh and Beatty, 2007). This judgment procedure yielded 42 items that was used in the survey instrument in Study 2.

**Study 2 – Scale Refinement**

An online survey through Qualtrics was conducted using a professional online panel. The online panel is ideal because it allows access to professional salespeople in various industries. Respondents were compensated for their participation. The online questionnaire was accessible through a link that was sent to the panel members. A total of 9,526 US-based professional salespeople were invited to participate. 2,858 people responded to the survey, representing a 35 percent response rate. Respondents must pass four qualification questions that confirmed that each participant was a B2B salesperson and was currently being coached by their sales manager. A total of 336 respondents were qualified to participate. To increase the quality of the data, 3 attention check questions were added and “speeders” (i.e., people who completed the survey within 1/3 the median time) were eliminated from the analysis. As a result, 207 respondents completed the survey and passed each attention check question. To reduce survey response bias,
the order of all survey questions were randomized through Qualtrics. About 68 percent of the respondents were between the ages of 25 and 49, 52 percent were men, and 60 percent had five or more years of professional sales experience.

Next, the appropriateness of the 42 items that reflects effective sales was tested using exploratory factor analysis through the analytical software, SPSS 24. We chose the principal axes factor analysis method with oblique rotation (i.e., direct oblimin with delta set at zero) in order to extract the minimum number of factors that accounts for the common variance (correlation), excluding variable-specific variance (Hatcher, 1994; Malhotra, 1999; Walsh and Beatty, 2007). In addition, because we expected the dimensions to correlate, an oblique rotation was necessary. A measure of sampling adequacy was tested using the Kaiser-Meyer-Olkin (KMO) measure and the Bartlett’s Test of Sphericity. The KMO of 0.966 indicated the correlation matrix was “marvelous” (Kaiser, 1974) and the significant Bartlett’s Test of Sphericity (p<0.001) indicated the validity and suitability of principal axis factor analysis. A minimum eigenvalue of 1 was selected as the criterion for inclusion (Kim and Mueller, 1978). The iterative process of removing items with factor loadings less than 0.40 or factor cross-loadings below 0.20 continued until a clean factor structure was achieved. The factor analysis resulted in a three-factor structure with 16 items that accounted for 68 percent of the variance. All items had factor loadings above 0.40, cross-loadings greater than 0.20 between factors, communalities above 0.50, and item-to-item correlations above 0.20. Table 2 provides more details of the results of the factor analysis.

**Study 3 – Scale Validation**

To further validate the three-factor, 16 items scale identified in Study 2, a second sample of B2B salespeople was collected through two sampling frames: A professional online panel and
a Fortune 500 insurance company. Respondents were compensated for their participation. Panel members and sales professionals were sent a link that allowed them access to the online survey that was hosted through Qualtrics. A total of 11,500 US-based professional salespeople were invited to participate through the online panel. 3,723 people responded to the survey, representing a 32 percent response rate. A total of 25 B2B salespeople at the target insurance firm were invited to participate. 19 salespeople responded, representing a 76 percent response rate. Respondents must pass four qualification questions that confirmed that each participant was a B2B salesperson and was currently being coached by their sales manager. To increase the quality of the data, 3 attention check questions were added. A total of 241 qualified respondents successfully completed the survey. About 63 percent of the respondents were between the ages of 25 and 49, 64 percent were men, and 64 percent had three or more years of professional sales experience.

Next, the three-factor, 16-item scale was validated using confirmatory factor analysis (CFA) through AMOS 24. The model fit statistics revealed an excellent overall fit (CFI=0.97, SRMR=0.05, RMSEA=0.064, $\chi^2$/df = 1.84 ($p<0.001$)). All indices exceeded the recommended threshold levels (Hu and Bentler, 1999). All items were retained with standardized loadings ranging between 0.63 and 0.91. The average variances extracted (AVE) of each dimension was above 0.50 and the composite reliability for each dimension was greater than 0.60 (Bagozzi and Yi, 1988; Fornell and Larcker, 1981). Taken all together, the results supported the conceptualization of the three dimensions, as well as each construct’s reliability and internal consistency. Details of the results of the CFA are found in Table 3.
Table 3: SCES Factors

<table>
<thead>
<tr>
<th>Factor 1: Adaptability</th>
<th>Study 2&lt;sup&gt;a&lt;/sup&gt;</th>
<th>Study 3&lt;sup&gt;b&lt;/sup&gt;</th>
</tr>
</thead>
<tbody>
<tr>
<td>- My manager understands that each salesperson is different, having varying strengths and weaknesses</td>
<td>$\gamma=8.92$</td>
<td>AVE=0.73, cr=0.94</td>
</tr>
<tr>
<td>- My manager communicates to me the way I prefer to be communicated</td>
<td>0.81</td>
<td>0.81</td>
</tr>
<tr>
<td>- My manager manages me the way I prefer to be managed</td>
<td>0.79</td>
<td>0.89</td>
</tr>
<tr>
<td>- My manager adapts to the way I like to do things</td>
<td>0.79</td>
<td>0.84</td>
</tr>
<tr>
<td>- My manager adapts his coaching style to my needs and preferences</td>
<td>0.77</td>
<td>0.83</td>
</tr>
<tr>
<td>- My manager is sensitive to my coaching needs</td>
<td>0.67</td>
<td>0.79</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Factor 2: Involvement</th>
<th>Study 2&lt;sup&gt;a&lt;/sup&gt;</th>
<th>Study 3&lt;sup&gt;b&lt;/sup&gt;</th>
</tr>
</thead>
<tbody>
<tr>
<td>- My manager observes me as I sell to clients</td>
<td>$\gamma=1.72$</td>
<td>AVE=0.56, cr=0.87</td>
</tr>
<tr>
<td>- My manager brings to my attention how I can perform better as a salesperson</td>
<td>0.84</td>
<td>0.71</td>
</tr>
<tr>
<td>- My manager roles plays with me (as buyer or seller)</td>
<td>0.67</td>
<td>0.83</td>
</tr>
<tr>
<td>- My manager is involved with me in the field (i.e., sells alongside me)</td>
<td>0.65</td>
<td>0.63</td>
</tr>
<tr>
<td>- My manager brings to my attention what I need to improve</td>
<td>0.65</td>
<td>0.76</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Factor 3: Rapport</th>
<th>Study 2&lt;sup&gt;a&lt;/sup&gt;</th>
<th>Study 3&lt;sup&gt;b&lt;/sup&gt;</th>
</tr>
</thead>
<tbody>
<tr>
<td>- My manager and I have a personal relationship that expands beyond the workplace</td>
<td>$\gamma=1.18$</td>
<td>AVE=0.68, cr=0.91</td>
</tr>
<tr>
<td>- I feel comfortable talking to my manager about personal (non-work related) topics</td>
<td>0.84</td>
<td>0.72</td>
</tr>
<tr>
<td>- My manager understands me on a personal level</td>
<td>0.80</td>
<td>0.84</td>
</tr>
<tr>
<td>- I can tell my manager anything</td>
<td>0.74</td>
<td>0.91</td>
</tr>
<tr>
<td>- My manager opens up to me</td>
<td>0.71</td>
<td>0.87</td>
</tr>
<tr>
<td>- My manager adapts his coaching style to my needs and preferences</td>
<td>0.67</td>
<td>0.79</td>
</tr>
</tbody>
</table>

<sup>a</sup>From exploratory factor analysis
<sup>b</sup>From confirmatory factor analysis
<sup>c</sup>$\gamma$=eigenvalues

The validity of the SCES scale was assessed based on the content validity and the construct validity (i.e., discriminant and convergent validity). Based on the inter-item correlations, the SCES scale seems to be reasonably content valid (Walsh and Beatty, 2007). Discriminant validity was tested using the Fornell and Larcker (1981) method, i.e., the square root of the AVE for each latent variable exceeds the correlation between both latent variables. All possible pairs of factors passed this test. The correlations ranged from 0.61 to 0.79. The
square root of the AVE for each factor ranged from 0.75 to 0.85. Therefore, the dimensions of
the SCES scale are discriminately valid.

Convergent validity was assessed by examining the lambda (factor) loadings of each item
developed to measure each dimension of sales coaching effectiveness. As indicated in Table 2,
all factor loadings exceeded 0.50 and are statistically significant at the 0.001 level. In addition,
the AVE for each dimension was equal to or greater than 0.50. Taken altogether, the results
support convergent validity of each dimension (Bagozzi and Yi, 1988; Fornell and Larcker,

Lastly, we examined the fit of a second-order SCES construct. This is appropriate due to
the relatively high intercorrelations between the three SCES factors (Anderson and Gerbing,
1988; Walsh and Beatty, 2007). The overall fit of the second-order model is excellent (CFI=0.97,
SRMR=0.05, RMSEA=0.064, $\chi^2$/df = 1.84 ($p<0.001$)) and provides similar fit than the
multidimensional model. The factor loadings for the three sub-dimensions were 0.97
(adaptability), 0.75 (involvement), and 0.81 (rapport), which are all above the minimum 0.50
benchmark (Bagozzi and Yi, 1998; Fornell and Larcker, 1981). In addition, the second-order
construct explained for 77 percent of the average variance (AVE). Taken collectively, the results
indicated that the second-order model is also appropriate. Hence, it is appropriate to test the
nomological validity of the SCES construct using either the multidimensional constructs or the
second-order constructs of the scale.

**Nomological validation of SCES**

In order to establish external validity of the SCES scale, we tested the SCES construct
within a theoretical framework with established hypothesized relationships with extant
antecedent and consequent factors (Netemeyer, Bearden, and Sharma, 2003).
**Antecedent of SCES**

*Knowledge.* The knowledge that the sales coach possesses affects his or her ability to coach others effectively. *Knowledge possession* refers to the industry knowledge, product/service knowledge, company knowledge, competitor knowledge, and general business knowledge that one holds. The more sales-related knowledge a manager possesses, the more effective s/he can be in facilitating knowledge such as providing feedback, role-playing, and participating “in the field.” In a qualitative study between salespeople and sales managers conducted by Deeter-Schmelz, Goebel, and Kennedy (2008), the authors found that salespeople look to managers as knowledge brokers and, thus, important sources of information. Salespeople rely on their manager for information when they seek answers to questions or challenges that they may face within a selling situation or with a buyer. On the other hand, sales managers find that their knowledge possession enhances the trust with salespeople such that salespeople can feel comfortable and confidence seeking help or support from their managers. From both perspectives, it seems that the knowledge that the manager possesses plays a direct or indirect role in the coaching process. That is, the impact of the sales manager’s knowledge on the effectiveness of sales coaching is twofold. First, it is hypothesized to create an open line of communication between managers and salespeople such that salespeople are comfortable providing managers with information when seeking advice. Second, it provides salespeople with a valuable source of information to tap into when they are faced with difficulties.

H1: There is a positive relationship between sales manager’s perceived sales knowledge and sales coaching effectiveness.

*Servant leadership.* Leadership is a topic that has been extensively studied by sales researchers (e.g., Mulki, Jaramillo, and Locander, 2005; Yoshida et al., 2014). Sales researchers
have extensively research two popular forms of leadership: transformational leadership and servant leadership. Transformational leadership is a leadership style that focuses on the inspiration of followers to perform beyond expectations for the collective values and needs of the organization (Bass, 1990). Transformational leaders use rewards and praise to encourage higher performance (Rafferty and Griffin, 2004). Behavioral dimensions that distinguish transformational leaders from other forms of leadership includes communicating the organization’s vision, role modeling (e.g., leading by example), encouraging followers to think outside the box, individualized consideration/attention, and recognizing and rewarding followers (Bass, 1985; Rafferty and Griffin, 2004). On the other hand, servant leadership is a leadership style that focuses on the needs and welfare of followers, in which leaders possess a genuine and sincere desire to serve others by placing followers’ needs and interests ahead of the leaders’ own (Greenleaf, 1977; Greenleaf and Spears, 2002). Servant leaders develop employees in the areas of task effectiveness and self-determination and motivation, as well as provide vision and personalized attention, thereby gaining credibility and trust from their employees (van Dierendonck et al., 2014; Farling, Stone, and Winston, 1999; Schaubroeck, Lam, and Chunyan Peng, 2011). Servant leaders primarily use one-on-one communication to assess and understand the knowledge, skills, abilities, goals, desires, and potential of each employee (Dierendonck et al., 2014; Liden et al., 2008).

While both transformational and servant leadership styles share the same qualities such as a focus on followers and a communication of visions for the future, servant leadership is distinct from transformational leadership in several ways. One, servant leaders’ primary focus is on employees versus transformational leaders’ focus is on the organization. Two, Barbuto and Wheeler (2006) assert that servant leaders have a genuine desire to serve others, whereas
transformation leaders have a *desire to lead and inspire others*. Indeed, Dierendonck et al. (2014) find that servant leaders are perceived to satisfy the needs of each of their employees more so than transformational leaders. Taken altogether, it is hypothesized that sales managers who adopt the qualities of servant leaders would be perceived as more effective sales coaches because those sales managers (i.e., servant leaders) are expected to be more involved in the coaching process to assess, understand, and develop each salesperson, to be more sensitive and adaptive to the needs of the salesperson, and to be more genuine in the development of deeper, more meaningful personal relationships with each team member.

H2: There is a positive relationship between servant leadership and sales coaching effectiveness.

**Consequences of SCES**

*Sales Performance.* Practitioners and academics have found that coaching has a positive impact on performance. In the athletic coaching domain, effective athlete-coach relationships result in better performance through giving feedback and by correcting and reinforcing behaviors (Becker and Wrisberg, 2008). In the executive coaching literature, effective coaches have been found to elevate the leadership skills and organizational performance level of executives (Feldman and Lankau, 2005). In the managerial coaching domain, researchers also find that managers/supervisors facilitate learning of work-related skills and abilities to improve job performance (Agarwal, Angst, and Magni, 2009; Ellinger et al., 2011; Hagen, 2010). In addition, sales practitioners and academics find that coaching improves both individual and organization performance (Deeter-Schmelz, Goebel, and Kennedy, 2008; Ingram et al., 2005, Sales Management Association, 2014). In summary, across multiple domains in the academic and practitioner domains, effective coaching consistently enhances performance.
H3: There is a positive relationship between sales coaching effectiveness and sales performance.

*Job Satisfaction.* When coaching is provided by an organization, issues related to the job will be addressed by the coach during the coaching sessions. Presuming that the coaching was successful, any job-related issues should be resolved and, thus, the employee is expected to be more satisfied with their job. In addition, it is asserted that salespeople are likely to view coaching as a gesture of concern for and interest in the development of the salesperson (Onyemah, 2009). Indeed, Onyemah (2009) found a correlation between when sales coaching is offered and salespeople’s satisfaction with their job. This is also consistent with findings in the managerial coaching domain (Ellinger, Ellinger, and Keller, 2003).

H4: There is a positive relationship between sales coaching effectiveness and job satisfaction.

**Measurement of Antecedents and Consequences**

Scales were adopted or adapted from previous sales literature. First, the five-items sales technical knowledge scale was adopted from Rentz et al. (2002), which assesses the manager’s knowledge regarding the product, competitor, company, and customer. Second, the 12-items servant leadership scale was adopted from Ehrhart (2004) and captures the manager’s propensity to serve others. Both of these scales were measured using a seven-points Likert scale (1=strongly disagree; 7=strongly agree). Third, the 6-items job satisfaction scale was adapted from Churchill, Ford, and Walker (1974), which measures level of satisfaction with one’s job, company, compensation and supervisor, was assessed using a 7-points scale (1=very dissatisfied; 7=very satisfied). Finally, the self-reported, 3-items sales performance scale was adapted from Behrman and Perreault (1984) and Sujan, Weitz, and Kumar (1994). The construct was measured with a 7-
points scale (1=needs substantial improvement; 7=outstanding) to assess the salesperson’s ability to generate sales for his/her company. Additional details on the scale items are provided in Table 4.

Table 4: SCES Antecedents and Consequences

<table>
<thead>
<tr>
<th>Factor: Sales Technical Knowledge</th>
<th>AVE and Composite Reliability</th>
<th>Source/Adapted From</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>AVE=0.68, cr=0.91</td>
<td>Rentz et al., 2002</td>
</tr>
<tr>
<td>- My manager is knowledgeable of our customers’ markets and products</td>
<td>0.86</td>
<td></td>
</tr>
<tr>
<td>- My manager is knowledgeable of his/her company’s procedures</td>
<td>0.82</td>
<td></td>
</tr>
<tr>
<td>- My manager is knowledgeable of our competitors’ products, services, and sales policies</td>
<td>0.84</td>
<td></td>
</tr>
<tr>
<td>- My manager is knowledgeable of our product line, including product features and benefits</td>
<td>0.80</td>
<td></td>
</tr>
<tr>
<td>- My manager is knowledgeable of our customers’ operations (e.g., store and shelf layout, employee training, etc.)</td>
<td>0.80</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Factor: Servant Leadership</th>
<th>AVE and Composite Reliability</th>
<th>Source/Adapted From</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>AVE=0.69, cr=0.96</td>
<td>Ehrhart, 2004</td>
</tr>
<tr>
<td>- My manager spends time to form quality relationships with his sales team</td>
<td>0.89</td>
<td></td>
</tr>
<tr>
<td>- My manager creates a sense of community among the sales team</td>
<td>0.86</td>
<td></td>
</tr>
<tr>
<td>- My manager’s decisions are influenced by the sales team’s input</td>
<td>0.76</td>
<td></td>
</tr>
<tr>
<td>- My manager tries to reach consensus among the sales team on important issues</td>
<td>0.78</td>
<td></td>
</tr>
<tr>
<td>- My manager is sensitive to the sales team’s responsibilities outside the workplace</td>
<td>0.78</td>
<td></td>
</tr>
<tr>
<td>- My manager makes the personal development of the his/her salespeople a priority</td>
<td>0.87</td>
<td></td>
</tr>
<tr>
<td>- My manager holds salespeople to high ethical standards</td>
<td>0.84</td>
<td></td>
</tr>
<tr>
<td>- My manager does what she or he promises to do</td>
<td>0.83</td>
<td></td>
</tr>
<tr>
<td>- My manager balances concern for day-to-day details with projections for the future</td>
<td>0.85</td>
<td></td>
</tr>
</tbody>
</table>
Table 4: SCES Antecedents and Consequences (Continued)

<table>
<thead>
<tr>
<th>Factor: Job Satisfaction</th>
<th>AVE=0.63, cr=0.91</th>
<th>Churchill, Ford, and Walker, 1974</th>
</tr>
</thead>
<tbody>
<tr>
<td>- Overall job satisfaction</td>
<td>0.87</td>
<td></td>
</tr>
<tr>
<td>- My compensation (salary)</td>
<td>0.81</td>
<td></td>
</tr>
<tr>
<td>- Opportunities for advancement</td>
<td>0.84</td>
<td></td>
</tr>
<tr>
<td>- Job security</td>
<td>0.74</td>
<td></td>
</tr>
<tr>
<td>- Company policies</td>
<td>0.75</td>
<td></td>
</tr>
<tr>
<td>- My supervisor overall.</td>
<td>0.75</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Factor: Performance</th>
<th>AVE=0.70, cr=0.88</th>
<th>Behrman and Perreault, 1984; Sujan, Weitz, and Kumar, 1994</th>
</tr>
</thead>
<tbody>
<tr>
<td>- Producing a high market share for this company in a specific territory</td>
<td>0.84</td>
<td></td>
</tr>
<tr>
<td>- Making sales of those products with the highest profit margins</td>
<td>0.81</td>
<td></td>
</tr>
<tr>
<td>- Generating a high level of dollar sales.</td>
<td>0.86</td>
<td></td>
</tr>
</tbody>
</table>

1 7-points likert scale (1=strong disagree; 7=strongly agree)
2 7-points scale (1=very dissatisfied; 7=very satisfied)
3 7-points scale (1=needs substantial improvement; 7=outstanding)

Results

To assess the effects of each proposed antecedents and consequences, we conducted structural equation modeling (maximum likelihood method) using AMOS 24. This method is preferred to regression-based tests because it accounts for the measurement error from the latent variables, thus reducing the chances of Type 1 errors (Rigdon, Schumacker, and Wothke 1998; Walsh and Beatty, 2007). All model fit indices exceeded the recommended threshold levels (Hu and Bentler, 1999). Hence, the results of the structural model indicated a good fit with the data (CFI=0.92, SRMR=0.06, RMSEA=0.062, χ²/df = 2.41 (p<0.001)).
It was hypothesized that the sales knowledge and servant leadership would have a direct impact on sales coaching. Results indicated that sales coaching was positively affected by sales knowledge (H1: $\beta = 0.26, p < 0.001$) and servant leadership (H2: $\beta = 0.72, p < 0.001$). It was posited that effective sales coaching would positively impact sales performance and job satisfaction. Indeed, results indicated that effective sales coaching enhanced sales performance (H3: $\beta = 0.38, p < 0.001$) and job satisfaction (H4: $\beta = 0.54, p < 0.001$) among salespeople.

Post-hoc analyses also revealed differences in responses based on how experienced the salesperson perceived himself/herself. Each respondent indicated whether s/he self-identified as a novice, intermediate, or expert salesperson. The results indicated that the manager’s technical knowledge had no influence on the overall effectiveness of his/her coaching, whereas the technical knowledge significantly impacted coaching effectiveness among intermediate ($\beta = 0.29, p < 0.05$) and expert ($\beta = 0.40, p < 0.001$) salespeople. This suggests that novice salespeople may lack the requisite sales experience and knowledge to determine the extent the sales manager’s knowledge is affecting the manager’s coaching effectiveness. These results provide further evidence of nomological validity.
DISCUSSION

The primary contribution of this paper is the development of the SCES scale. We identify, test, and validate three dimensions (adaptability, involvement, and rapport) of sales coaching effectiveness that are important in the sales coaching process. This study offers several contributions to academics and practitioners within the coaching domain.

Contributions

Academic

First, this study answers calls to research by Hagen and Peterson (2015) and by Badrinarayanan et al. (2015) to develop a sales coaching effectiveness scale that includes items that reflect the behaviors and skills of effective coaches, as well as dimensions that are generated by inputs from both sales managers (as coaches) and salespeople (as coachees). Through a rigorous qualitative and quantitative scale development process, we develop the SCES scale that is appropriate for use within the sales context. The SCES can be used as a unidimensional or multidimensional scale. In addition, it is important to note that post-hoc analyses examining the fit and predictive validity (of performance) of the BCS scale and the SCES scale showed that both scales possessed good fit (based on fit indices) of the data input, however the SCES scale (as a second-order construct) predicted 6% more of the variance in performance compared to the BCS scale (17% vs. 11%). This provides further evidence of the appropriateness of the SCES scale among salespeople. Future research could test whether these new SCES dimensions contribute to the BCS and CSS scales’ predictability of various performance, learning, and attitudinal outcomes in non-sales contexts.
Second, the SCES dimensions and items are similar yet distinct from those identified in the managerial coaching domain. The SCES scale contains items that reflect the *facilitating knowledge* dimension (e.g., “My manager brings to my attention how we can perform better as a salesperson”) found in the BCS scale and the *open communication* (e.g., “my manager opens up to me”) and *value people* (e.g., “My manager brings to my attention how we can perform better as a salesperson”) dimensions found in the CSS scale. Moreover, the SCES scale contains items that reflect new dimensions, i.e., *involvement, adaptability*, that arguably are not found in the BCS and CSS scales. One, the involvement dimension shows that providing feedback is only one of the ways in which managers can facilitate knowledge and assess salespeople. Among others, the manager facilitates learning also through role play and field observation/participation. Two, the adaptability dimension confirms what practitioners and academics have asserted, i.e., that effective sales managers must be able to adapt to each salesperson’s characteristic and needs (Badrinarayanan et al., 2015; Rich, 1998). Sales adaptability has been investigated extensively from the salesperson’s perspective. Research shows that salespeople who are more adaptive perform at a higher level (Park and Halloway, 2003; Spiro and Weitz, 1990; Verbeke, Dietz, Verwaal, 2011). Similarly, the results herein suggest that adaptability is also important for managers such that managers are more effective if they adapt to the salesperson’s communication style, management style, coaching style, and individual needs. The adaptability dimension items generated through the qualitative data provides academics and practitioners with insights on the specific aspects that a salesperson prefers their managers to adapt to.

Managerial

The SCES scale can help practitioners and sales organizations improve their coaching program. First, sales organizations understand the importance of coaching, yet managers still
lack the training to properly coach others (Richardson, 2016). A recent survey of 266 companies by Richardson (2016) found that the top challenge among coaching programs within sales organizations is a lack of training. Much of the practitioner-related articles and books on sales coaching focuses on the facilitation of learning, such as providing feedback, but they overlook the other important dimensions of coaching, such as the rapport and adaptability, that impact the overall effectiveness of the sales coach (e.g., Richardson, 2008; Shawn, 2013). Therefore, this study can help generate training topics that prepare sales managers with the requisite knowledge, skills and abilities to effectively coach their team.

Second, the SCES scale can be used as an assessment or diagnostic tool to improve the overall effectiveness of salesperson-sales manager coaching. Salespeople can evaluate their sales coaches and communicate those areas that their coach currently lacks or needs improvement. Sales managers can use the scale to assess not only the overall effectiveness of their coaching but also identify the specific problem areas that hinder coaching and, thus, need attention. This is importance as research on perceptual (in)congruity has shown that sales managers and salespeople vary in their perceptions that have detrimental effects on job-related outcomes (Evans et al., 2002). The SCES scale allows managers and salespeople to have more focused and effective conversation about how to improve the coaching interaction and, therefore, can potentially reduce any misperceptions about coaching that either party may possess.

Limitations and Future Research

The SCES scale dimensions identified in this paper is the first step to our understanding of sales coaching effectiveness. In order to deepen our knowledge of sales coaching, additional research is needed. One avenue worth pursuing is to investigate how the three SCES dimensions, relate to one another and their relative impact on sales-related behavioral and attitudinal outcome.
variables. For instance, it is possible that when sales managers develop deeper, more personal relationships with a salesperson that the coaching involvement is increased because both parties are willing to share their thoughts/feelings and are more willing to be vulnerable (i.e., make mistakes, share strengths/weaknesses, etc.), thereby enhancing the quality of feedback provided.

Differences in context may also influence coaching effectiveness. This study was limited within a business-to-business (B2B) context. Replication studies within a business-to-consumer (B2C) context is warranted in order to test the generalizability of the scale outside a B2B environment. These differences may include, for instance, varying price points, sales cycle, and selling tactics. Moreover, in this study, we looked at salespeople who are coached by their sales manager. But, coaching also happens between salespeople (e.g., a novice with expert salesperson) and with third party coaches (Richardson, 2016). Future research would test the SCES scale under those circumstances to determine its generalizability on those type of coaching scenarios.

Finally, sales performance was measured subjectively from the salesperson’s perspective. Not to mention, this study did not look at the dyadic relationship between sales manager and salesperson. Future research should examine the dyadic relationship as well as the objective sales performance record.
REFERENCES


ESSAY 3:
HOW EFFECTIVE SALES COACHES IMPACT SALESPERSON’S PERFORMANCE:
A SELF-DETERMINATION THEORETICAL APPROACH

While scholars and practitioners acknowledge the positive relationship between coaching and performance, research on the mechanisms that drive performance is relatively limited. Much of the research has addressed the question, “does coaching enhance performance?” but largely ignores how coaching affects performance. By understanding the mechanisms that drives performance in sales coaching, we can begin to develop recommendations for interventions in coaching programs. Hence, this paper aims to address this gap through survey-based research using structural equation modeling (SEM).

We draw on self-determination theory (SDT; Deci and Ryan, 2000) to help us understand the mechanisms that drive the relationship between coaching and performance. SDT emphasizes individuals’ needs satisfaction and motivation that are imperative in coaching (Spence and Oades, 2011). SDT posits that individuals are motivated through the satisfaction of psychological needs, including needs for competence, autonomy, and relatedness, that lead to effectiveness and well-being. We parallel SDT to coaching and develop a dual-process model of coaching, in which coaching enhances performance through two paths: motivational and learning.

BACKGROUND
Sales practitioners acknowledge the positive effect that coaching has on performance (Corcoran, Petersen, Baitch, and Barret, 1995; Richardson, 1996; 2008; Rosen, 2008). Research from the
Corporate Executive Board (CEB; 2014) indicates that salespeople achieve an average of 19% more sales towards their goal when they have a “highly effective coach.” In fact, the CEB reports that sales representatives who receive just three hours of coaching a month exceed their goals by 7% and increase their close rates by 70%, thereby generating an average 25% more revenue for firms. According to the International Coach Federation (ICF; 2009), effective coaching results in a return of 7 times the initial investment. Indeed, effective coaching has a direct, measurable impact on key performance indices. Despite these benefits, according to Theeboom, Beersma, and van Vianen’s (2013) meta-analysis of studies investigating the effects of coaching on individual performance, most of the extant research has been conducted by practitioners and lack empirical evidence.

To address this gap, management scholars have recently started to investigate the effects of coaching on employee performance (e.g., Agarwal, Angst, and Magni, 2009; Ellinger, Ellinger, and Keller, 2003; 2005). Agarwal, Angst, and Magni (2009), for instance, show a positive relationship between coaching intensity (i.e., increased levels of “more coaching” versus “more telling” among managers and greater perceptions of “effective coaching”) and subjective sales performance among the sales force. Ellinger, Ellinger, and Keller (2003; 2005) find that perceived coaching behaviors is positively related to manager’s perception of warehouse employees’ performance. Indeed, meta-analyses conducted by several academic scholars confirm the positive relationship between coaching and performance (Theeboom, Beersma, and van Vianen, 2013; Sonesh et al., 2015). In the sales domain, researchers have asserted that sales coaching enhances sales performance (Deeter-Schmelz, Goebel, and Kennedy, 2008; Onyemah, 2009; Rich, 1998), however none of these assertions are empirically tested.
Although limited, the extant studies provide useful insight within the coaching domain. That is, that coaching indeed works. It is no wonder why the total annual expenditure for coaching is estimated at $2 billion globally, according to the International Coaching Federation (2014). However, questions remain regarding how coaching specifically effects performance, especially in the sales domain where sales researchers call for “additional theory-driven and practice-oriented research (Badrinarayanan et al., 2015; p. 1103).” To help us understand the mechanisms that drive coaching and performance, we draw on self-determination theory (SDT; Deci and Ryan, 2000), which is a theory of motivation and well-being based on the satisfaction of psychological needs, including needs for competence, autonomy, and relatedness. Next, we discuss SDT in more detail.

**THEORETICAL DEVELOPMENT**

**Self-Determination Theory (SDT)**

SDT has been successfully applied in several domains including management, education, healthcare, sports, and parenting (Ryan, Olafsen, and Ryan, 2017). SDT posits that an individual’s performance and well-being are influenced by the type of motivation that they possess for the related job tasks (Deci and Ryan, 1985; 2000).

SDT proposes that people have three basic psychological needs that are essential for psychological well-being. According to Deci and Ryan (1985; 2000), the three basic psychological needs are: autonomy, competence, and relatedness. Autonomy pertains to the feeling of control in one’s actions, i.e., the sense that one’s actions are self-determined versus other-determined. Competence pertains to the sense that one has the ability to perform a task that results in positive outcomes. Relatedness pertains to the feeling of connectedness with others.
within collectives. It should be noted that in SDT the satisfaction of autonomy is considered primary (Deci and Ryan, 1985; 2000).

SDT asserts that there are four types of motivation (Deci and Ryan, 1985; 2000). These motivations, running from a continuum of high to low self-determination (or autonomy), include: intrinsic, self-determined extrinsic, non-self-determined extrinsic, and amotivation (O’Connor and Vallerand, 1994).

Intrinsic motivation refers to the enjoyment or pleasure that an individual obtains from a particular task. Intrinsic motivation occurs in the absence of material rewards or constraints (O’Connor and Vallerand, 1994). For example, a salesperson cold calling prospects for the simple excitement derived from developing new business.

Extrinsic motivation refers to action taken to receive a reward or avoid punishment. O’Connor and Vallerand (1994) distinguishes between non-self-determined and self-determined extrinsic motivation. Non-self-determined extrinsic motivation occurs when behavior is externally regulated such as through rewards or punishments (O’Connor and Vallerand, 1994). For example, a salesperson may cold call prospects because s/he feels urged by his/her manager. Developing new business could be a pleasurable and satisfying process but, in this case, the salesperson is cold calling potential prospects to avoid punishment by his/her manager. Hence, the behavior is extrinsically motivation (i.e., manager) and is not by choice, or self-determined. In this case, the individual would feel like s/he is being controlled by the external reward or constraint (Deci and Ryan, 1985; 2000). On the other hand, self-determined extrinsic motivation occurs when an action is voluntary, willful, and volitional. For example, a salesperson decides to cold call potential prospects because it will help him sustain a book of business with customers
throughout the sales cycle. In this case, the salesperson would feel a sense of purpose rather than obligation or pressure with the task of cold calling prospects.

Finally, amotivation refers to the lack of energy, will, and desire to complete a particular task. Amotivated behaviors are neither intrinsically nor extrinsically motivating. Effort exerted towards amotivated tasks is fleeting because it lacks purpose and desire. For example, a salesperson is cold-calling prospects but doesn’t know why s/he needs to do so when s/he can be doing other revenue generating tasks such as upselling or cross-selling existing accounts.

Autonomous, or high self-determined, motivation is linked to higher performance on complex or interesting tasks versus low self-determined, or controlled motivation (Gagne and Deci, 2005). When autonomous motivation occurs, there is a feeling of choice that leads improved well-being and increased effort towards an activity. In the example with the salesperson, s/he is more likely to persist, persevere, and add value in the development of new business when they find the process enjoyable (intrinsic motivation) than when the salesperson is doing it without direction and purpose (amotivation) or doing it because the manager makes him (non-self-determined extrinsic motivation). According to SDT, the type of motivation is influenced by the extent to which the environment offers opportunities for self-determination (Deci and Ryan, 1985; 2000, O’Connor and Vallerand, 1994).

Effective Sales Coaching and SDT

Effective sales coaching is defined as the consistent, individually-focused application of integrated professional, interpersonal, and intrapersonal knowledge to improve a salesperson’s competence, confidence, and performance in sales task-related and organization-related goals and objectives (Côté and Gilbert, 2009). Effective sales coaching is comprised of three different dimensions: Level of involvement, adaptability, and rapport/trust. Level of involvement refers to
the degree of engagement (e.g., observation vs. participation) in the sales coaching process. Adaptability refers to the sales manager’s ability to adapt to the salesperson’s communication, management and coaching style, preference, and need. Rapport/trust refers to the personal and professional relationship between the sales manager and salesperson.

Spence and Oades (2011) suggest that “coaches have the opportunity to create (with the coachee) an atmosphere in coaching that enhances [psychological] needs satisfaction based on what it assists the coachee to think about, what it helps them to feel and what it supports them to do (p. 43).” We argue that the three dimensions of an effective sales coach supports an environment that satisfies or enhances the psychological needs (autonomy, competence, and relatedness) of each salesperson, resulting in increased sales performance.

For instance, based on the items of the SCES scale, effective sales managers adapt to the individual needs and characteristics of each salesperson. Drawing on person-environment fit theory (Krisof-Brown et al., 2005), fit occurs when there is the “congruence, match, similarity, or correspondence between the person and the environment (Edwards and Shipp, 2007, p. 211).” According to P-E fit theory, when the needs of the individual are satisfied by the environment (e.g., supervisor), there is a fit between needs and supplies, referred to as needs-supplies (NS) fit (Greguras, Diefendorff, Carpenter, and Troster, 2014). It should be noted that needs in P-E fit theory conceptualized differently than needs in SDT. In P-E fit, needs are synonymous with desires (Greguras et al., 2014). For example, if an employee wants a better work-life balance or a higher salary, P-E fit theory would consider the work-life balance request a desire and the higher salary a need, whereas SDT would refer to both as desires or wants but not needs (Greguras et al., 2014). That said, Greguras et al., (2014) argues that when NS fit exists, the needs and desires/wants of individuals are both satisfied. For instance, if a salesperson needs a manager to
adapt to his/her communication style, e.g., for the manager to provide as much details as possible in coaching conversations, then the manager is satisfying his need for cognition and his psychological need for competence. Further, Greguras et al. (2014) posit that greater fit between the supervisor and subordinate results in an environment where employees can satisfy their psychological and non-psychological needs. This is evident in studies that examine the leader-member exchange (LMX) relationship between a manager and subordinate, in which higher LMX relationships is shown to result in greater exchanges between the members, whereby managers provide greater resources to employees to satisfy their needs (Graen and Uhl-Bien, 1995).

Taken together, a sales manager who adapts to a salesperson should foster an environment that satisfies their psychological needs. The satisfaction of these three needs results psychologically well-being and in intrinsically (versus extrinsically) motivated actions (Deci and Ryan, 1985; 2000; Guay, Boggiano, and Vallerand, 2001), which has been found to be a strong predictor of performance (Cerasoli, Nicklin, and Ford, 2014). Consistent with SDT, studies have shown a positive relationship between the satisfaction of all three psychological needs and employees’ work-related well-being such as job satisfaction, attitudes such as decreased turnover intentions, and higher performance (Gagne and Deci, 2005). Thus, we hypothesize that:

H1: Effective coaching positively impacts intrinsic motivation.

Motivational Effects of Sales Coaching

Drawing from SDT, we argue that intrinsic motivation increases the effort that salespeople devote towards selling activities. In the education domain, research finds that intrinsically motivated students are more actively engaged in learning than those students who are extrinsically motivated (Benware and Deci, 1984). Similarly, when students find a task
intrinsically motivating, they devote more effort towards and are, over time, more persistent with
the task itself (Deci and Ryan, 2000), resulting in better test performance (Vansteenkiste, Lens,
& Deci, 2006) and higher academic achievement (Gottfried, 1985). This has also been supported
in other domains such as medicine (Simons, Dewitte, and Lens, 2004) and management in which
intrinsically motivation leads employees to expend greater degrees of effort leading to higher
performance (Grant, 2008). Thus we hypothesize the following:

H2: Intrinsic motivation positively impacts sales effort.
H3: Sales effort positively impacts sales performance.

Learning Effects of Sales Coaching

According to SDT, people have an inherent need for competence, that is, the desire to
feel effective in interacting with the environment (Deci and Ryan, 2000). Effective sales coaches
provide competence satisfaction in the one-on-one interaction and create conditions that foster
feelings of competence (Spence and Oades, 2011). For instance, one widely used coaching tool
among sales coaches is role play. Role plays create an environment that allows salespeople to
practice, make mistakes, and make adjustments so that they are better equipped with the requisite
skills when they conduct the actual sales calls with client(s). Another coaching tool is “ride-
alongs” in which the sales coach is in the field with the salesperson either as an observer or
participant. This allows the sales coach to observe or experience first-hand and in real-time the
salesperson’s performance, thereby enhancing the quality of the feedback that the sales coach
provides. The ongoing interaction between both coach and coachee allows the salesperson
multiple opportunities to discuss, share ideas, and practice selling, which is posited to enhance
their confidence, or self-efficacy, in their selling abilities. The satisfaction of the need for
competence prepares individuals with the requisite skills and abilities to adapt to complex and
changing environments (Deci and Ryan, 2000). However, failure of competence satisfaction will result in the feeling of helplessness and in reduced motivation (Deci and Ryan, 2000). Thus, we hypothesize the following:

H4: Effective coaching positively impacts self-efficacy.

H5: Self-efficacy positively impacts adaptive selling behaviors (adaptability).


Please refer to figure 4 for a path diagram of the proposed constructs.

Figure 4: Path Diagram

**METHODOLOGY**

**Sample**

An online survey through Qualtrics was conducted using a professional online panel. The online panel is ideal because it allows access to professional salespeople in various industries. Respondents were compensated for their participation. Panel members and sales professionals were sent a link that allowed them access to the online survey that was hosted through Qualtrics. A total of 11,500 US-based professional salespeople were invited to participate. 3,723 people responded to the survey, representing a 35 percent response rate. Respondents must pass four
qualification questions that confirmed that each participant was a B2B salesperson and was currently being coached by their sales manager. To increase the quality of the data, 3 attention check questions were added and “speeders” (i.e., people who completed the survey within 1/3 the median time) were eliminated from the analysis. An additional 6 respondents were eliminated from analysis because of ineligible responses when asked about their industry and product/service sold (e.g., a sample response was “asdf”). As a result, 210 respondents completed the survey and passed each attention check question. To reduce survey response bias, the order of all survey questions were randomized through Qualtrics. About 68 percent of the respondents were between the ages of 25 and 49, 52 percent were men, and 60 percent had five or more years of professional sales experience.

Measures

For this study, we used previously validated measures from the literature (see Table 1). With the exception of reported sales performance, each of the scales were measured using a seven-points Likert scale (1=strongly disagree; 7=strongly agree). The self-reported, three-items sales performance scale was adapted from Behrman and Perreault (1984) and Sujan et al. (1994). The construct was measured with a seven-points scale (1=needs substantial improvement; 7=outstanding). Please refer to Table 5 for more information on each construct and its measure.

Table 5: Constructs and Measures

<table>
<thead>
<tr>
<th>Factor: Sales Coaching Effectiveness Scale (SCES)</th>
<th>AVE and Composite Reliability</th>
<th>Source/Adapted From</th>
</tr>
</thead>
</table>
| Sub-dimension 1: Adaptability/  
- My manager adapts to the way I like to do things | AVE=0.71, cr=0.94  
0.84 | Essay 2 |
Table 5: Constructs and Measures (Continued)

<table>
<thead>
<tr>
<th>Construct</th>
<th>Score</th>
</tr>
</thead>
<tbody>
<tr>
<td>- My manager manages me the way I prefer to be managed</td>
<td>0.88</td>
</tr>
<tr>
<td>- My manager communicates to me the way I prefer to be communicated</td>
<td>0.88</td>
</tr>
<tr>
<td>- My manager adapts his coaching style to my needs and preferences</td>
<td>0.89</td>
</tr>
<tr>
<td>- My manager understands that each salesperson is different, having varying strengths and weaknesses</td>
<td>0.74</td>
</tr>
<tr>
<td>- My manager is sensitive to my coaching needs</td>
<td>0.84</td>
</tr>
<tr>
<td><strong>Sub-dimension 2: Involvement</strong></td>
<td></td>
</tr>
<tr>
<td>- My manager observes me as I sell to clients</td>
<td>0.55</td>
</tr>
<tr>
<td>- My manager brings to my attention how I can perform better as a salesperson</td>
<td>0.90</td>
</tr>
<tr>
<td>- My manager brings to my attention what I need to improve</td>
<td>0.78</td>
</tr>
<tr>
<td>- My manager is involved with me in the field (i.e., sells alongside me)</td>
<td>0.61</td>
</tr>
<tr>
<td><strong>AVE=0.52, cr=0.81</strong></td>
<td></td>
</tr>
<tr>
<td><strong>Sub-dimension 3: Rapport</strong></td>
<td></td>
</tr>
<tr>
<td>- My manager and I have a personal relationship that expands beyond the workplace</td>
<td>0.78</td>
</tr>
<tr>
<td>- I feel comfortable talking to my manager about personal (non-work related) topics</td>
<td>0.83</td>
</tr>
<tr>
<td>- My manager opens up to me</td>
<td>0.79</td>
</tr>
<tr>
<td>- I can tell my manager anything</td>
<td>0.84</td>
</tr>
<tr>
<td><strong>AVE=0.66, cr=0.88</strong></td>
<td></td>
</tr>
<tr>
<td><strong>Factor: Intrinsic Motivation</strong></td>
<td></td>
</tr>
<tr>
<td>- If I were independently wealthy, I would still sell for the challenge of it</td>
<td>0.86</td>
</tr>
<tr>
<td>- I wish I didn't have to retire someday so I could always continue selling for the pleasure of it</td>
<td>0.75</td>
</tr>
<tr>
<td>- I sell because I cherish the feeling of performing a useful service</td>
<td>0.71</td>
</tr>
<tr>
<td><strong>AVE=0.60, cr=0.82</strong></td>
<td></td>
</tr>
<tr>
<td><strong>Factor: Sales Effort Level</strong></td>
<td></td>
</tr>
<tr>
<td>- I work long hours to make my sales objectives</td>
<td>0.84</td>
</tr>
<tr>
<td>- I do not give up easily when I encounter a customer who is difficult to sell</td>
<td>0.53</td>
</tr>
<tr>
<td>- I work untiringly at selling a customer until I sell the product/service</td>
<td>0.68</td>
</tr>
<tr>
<td>- I work many hours a week</td>
<td>0.82</td>
</tr>
<tr>
<td><strong>AVE=0.53, cr=0.82</strong></td>
<td></td>
</tr>
</tbody>
</table>

Oliver and Anderson, 1994

Sujan, Weitz, and Kumar, 1994
Table 5: Constructs and Measures (Continued)

<table>
<thead>
<tr>
<th>Factor: Self-Efficacy</th>
<th>AVE=0.81, cr=0.93</th>
<th>Wang and Netemeyer, 2002</th>
</tr>
</thead>
<tbody>
<tr>
<td>- Overall, I am confident of my ability to perform my job well</td>
<td>0.91</td>
<td>0.91</td>
</tr>
<tr>
<td>- I feel I am very capable at the task of selling</td>
<td>0.88</td>
<td>0.88</td>
</tr>
<tr>
<td>- I feel I have the capability to successfully perform this job</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Factor: Adaptive Selling Behavior</th>
<th>AVE=0.65, cr=0.92</th>
<th>Spiro and Weitz, 1990</th>
</tr>
</thead>
<tbody>
<tr>
<td>- When I feel that my sales approach is not working, I can easily change to another approach</td>
<td>0.79</td>
<td>0.79</td>
</tr>
<tr>
<td>- I can easily use a variety of selling approaches</td>
<td>0.84</td>
<td>0.84</td>
</tr>
<tr>
<td>- It is easy for me to modify my sales presentation if the situation calls for it</td>
<td>0.84</td>
<td>0.84</td>
</tr>
<tr>
<td>- I feel confident that I can effectively change my planned presentation when necessary</td>
<td>0.75</td>
<td>0.75</td>
</tr>
<tr>
<td>- I vary my sales style from situation to situation</td>
<td>0.80</td>
<td>0.80</td>
</tr>
<tr>
<td>- I am very flexible in the selling approach I use</td>
<td>0.81</td>
<td>0.81</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Factor: Performance</th>
<th>AVE=0.72, cr=0.88</th>
<th>Behrman and Perreault, 1984; Sujan et al., 1994</th>
</tr>
</thead>
<tbody>
<tr>
<td>- Generating a high level of dollar sales</td>
<td>0.87</td>
<td>0.87</td>
</tr>
<tr>
<td>- Making sales of those products with the highest profit margins</td>
<td>0.78</td>
<td>0.78</td>
</tr>
<tr>
<td>- Producing a high market share for this company in a specific territory</td>
<td>0.89</td>
<td>0.89</td>
</tr>
</tbody>
</table>

1 7-points Likert scale (1=strong disagree; 7=strongly agree)  
2 7-points scale (1=needs substantial improvement; 7=outstanding)

Analysis and Results

Measurement Model

Confirmatory factor analysis was conducted using AMOS to assess the properties of latent variables (Anderson and Gerbing 1988). The results indicated an adequate fit for the data:  
\[ \chi^2 = 794.9, \text{df} = 466, \text{RMSEA} = .058, \text{CFI} = .93, \text{SRMR} = .064 \] (Hu and Bentler, 1999). Table 5 shows that composite reliability and average variance extracted are all adequate. Table 6 shows bivariate correlations among all constructs used in the conceptual model.
Table 6: Constructs and Correlations

<table>
<thead>
<tr>
<th></th>
<th>CR</th>
<th>AVE</th>
<th>1</th>
<th>2</th>
<th>3</th>
<th>4</th>
<th>5</th>
<th>6</th>
<th>7</th>
<th>8</th>
</tr>
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<tbody>
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<td>(1)</td>
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<tr>
<td>Adaptibility</td>
<td>0.936</td>
<td>0.71</td>
<td><strong>0.843</strong></td>
<td></td>
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<td></td>
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<td></td>
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<td>(2)</td>
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</tr>
<tr>
<td>Involvement</td>
<td>0.807</td>
<td>0.521</td>
<td>0.68</td>
<td><strong>0.721</strong></td>
<td></td>
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<td>(3)</td>
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</tr>
<tr>
<td>Rapport</td>
<td>0.884</td>
<td>0.655</td>
<td>0.802</td>
<td>0.274</td>
<td><strong>0.809</strong></td>
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<td>(4)</td>
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</tr>
<tr>
<td>Performance</td>
<td>0.884</td>
<td>0.718</td>
<td>0.414</td>
<td>0.346</td>
<td>0.136</td>
<td><strong>0.847</strong></td>
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<td>(5)</td>
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</tr>
<tr>
<td>Intrinsic Motivation</td>
<td>0.817</td>
<td>0.599</td>
<td>0.368</td>
<td>0.233</td>
<td>0.289</td>
<td>0.65</td>
<td><strong>0.774</strong></td>
<td></td>
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<tr>
<td>(6)</td>
<td></td>
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</tr>
<tr>
<td>Sales Effort</td>
<td>0.815</td>
<td>0.532</td>
<td>0.194</td>
<td>0.286</td>
<td>0.257</td>
<td>0.514</td>
<td>0.403</td>
<td><strong>0.729</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>(7)</td>
<td></td>
<td></td>
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<td></td>
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<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Adaptive Selling Behavior</td>
<td>0.917</td>
<td>0.647</td>
<td>0.386</td>
<td>0.232</td>
<td>0.451</td>
<td>0.463</td>
<td>0.732</td>
<td>0.132</td>
<td><strong>0.805</strong></td>
<td></td>
</tr>
<tr>
<td>(8)</td>
<td></td>
<td></td>
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<td></td>
<td></td>
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<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Self-Efficacy</td>
<td>0.926</td>
<td>0.808</td>
<td>0.317</td>
<td>0.352</td>
<td>0.467</td>
<td>0.335</td>
<td>0.055</td>
<td>0.132</td>
<td>0.008</td>
<td><strong>0.899</strong></td>
</tr>
</tbody>
</table>

Fornell and Larcker’s (1981) approach was used to assess discriminant validity. The AVE for each of the factors is greater than the squared correlations for all pairs of factors. The correlations ranged from .00 to .80. The square root of the AVE for each factor ranged from 0.72 to 0.90.

**Direct Effects Hypotheses**

Model testing was conducted using structural equation modeling (SEM) in AMOS 24 with maximum likelihood (ML) estimation. Bagozzi (2010) suggests that ML estimation is relatively ‘robust to departures from normality’ and can produce meaningful results with samples as low as 100. The results indicated an adequate fit for the data: $\chi^2 = 897.35$, df = 485, RMSEA = .06, CFI = .92, SRMR = .12 (Hu and Bentler, 1999). Thus, model findings were used for hypotheses testing.

It was hypothesized that coaching impacts performance through two separate paths. The
first path is the motivational path, i.e., that coaching impacts performance by enhancing intrinsic motivation (H1), which increases sales effort (H2). The increased sales effort results in higher performance (H3). As predicted, effective sales coaching was positively related to intrinsic motivation (H1: \( \beta = .54, t = 5.01 \)). Relatedly, intrinsic motivation was positively related to sales effort (H2: \( \beta = .44, t = 6.38 \)). Finally, sales effort was positively related to performance (H3: \( \beta = .20, t = 3.67 \)).

The second path in which coaching affects performance is the learning path, i.e., that coaching impacts performance by enhancing self-efficacy (H4), which increases adaptive selling behavior (H5), thereby resulting in increased sales performance (H6). As predicted, effective sales coaching was positively related to self-efficacy (H4: \( \beta = .27, t = 4.71 \)). Results showed that self-efficacy was positively related to adaptive selling behavior (H5: \( \beta = .84, t = 10.62 \)). Lastly, adaptively selling behavior was positively related to performance (H6: \( \beta = .52, t = 6.90 \)).

Post-Hoc Analysis

To determine whether the two paths fully mediated or partially mediated the relationship between coaching and performance, the direct path between coaching and performance was estimated. The results showed a significant relationship between coaching and performance (\( \beta = .23, t = 3.57 \)). The relationships between the two paths remained statistically significant, but the effects of sales effort (\( \beta = .19, t = 3.41 \)) and of adaptive selling behavior (\( \beta = .42, t = 5.73 \)) on performance were only slightly tempered. Taken together, results indicated that impact of coaching on performance is partially mediated through motivation (i.e., intrinsic motivation \( \rightarrow \) sales effort) and through learning (i.e, self-efficacy \( \rightarrow \) adaptive selling behavior).
DISCUSSION

The primary contribution of this paper is the identification of the mechanisms that drive the relationship between coaching and performance. Drawing from SDT, we test and validate a model in which coaching influences performances through two routes: motivational and learning. This study offers several contributions to academics and practitioners within the coaching domain.

Theoretical and Managerial Contributions

This paper addresses the question of how sales coaching effects performance. Previous researchers have largely examined whether coaching enhances performance (Agarwal, Angst, and Magni, 2009; Ellinger, Ellinger, and Keller, 2003; 2005), among other coaching-related outcomes. In the sales literature, through anecdotes and surveys, practitioners and researchers generally agree that coaching leads to higher sales performance (CEB, 2014; Corcoran, Petersen, Baitch, and Barret, 1995; Deeter-Schmelz, Goebel, and Kennedy, 2008; Onyemah, 2009; Rich, 1998; Richardson, 2008; 2016; Rosen, 2008, SMA 2015). While it is safe to assert that coaching does enhance performance, the question of how coaching enhances performance remains unanswered.

From a theoretical perspective, our results contribute to the coaching literature in two ways. First, our dual-process model explains more variance in performance than previous coaching models. For example, Ellinger, Ellinger, and Keller’s (2003; 2005) coaching model explains 18% of the variance of performance among warehouse workers. Similarly, Agarwal, Angst, and Magni’s (2009) model explains for 23% of the performance among salespeople of within a direct salesforce. On the other hand, our dual-process model explains 39% of the
performance among B2B salespeople, a significant improvement among previous models aforementioned, and is considered to be about a “medium” effect size (Cohen, 1988).

Second, we answer calls for research by Badrinarayanan et al. (2015) to investigate whether coaching indeed enhances “cognitive abilities (e.g., practice intelligence and emotional intelligence) (p. 1104).” Indeed, a recent meta-analysis by Sonesh et al. (2015) found that “coaching had a significant positive effect on coachee behavioral change … [but] cognitive outcomes (e.g., coachee self-awareness and strategic thinking) were not significantly improved by coaching (p. 86-87).” On the contrary, our findings suggest that sales coaching has a significant positive effect on behavior and cognitive abilities. Specifically, our model shows that coaching positively impacts self-efficacy (a proxy of sales behavior assuming that improved behaviors should manifest in more confidence in one’s abilities) and indirectly influences sales adaptability (a proxy of cognitive abilities). This may be explained by the fact that sales coaching is different than managerial coaching, which lends credence to calls for more research on coaching in the sales domain (e.g., Badrinarayanan et al., 2015).

From a practical perspective, the identification of these dual processes (i.e., the mechanisms that drive coaching) will help practitioners develop coaching interventions and programs for sales coaches. Surveys show that managers tend to coach low (or struggling) performers, especially when managers have limited time to coach due to increasing managerial responsibilities (CEB 2014; Richardson, 2016). Indeed, in a study by Dixon and Adamson (2011), the authors find that sales coaching is most effective (i.e., increasing performance) among core performers (middle 60%) and they assert that low performers lack the motivation to be coached and high performers are too skilled. This implies that coaches may primarily focus on developing selling skills (i.e., the learning path in our model) and neglect (or focus less on) the
motivational, specifically intrinsic motivation, aspect of coaching. Our model suggests that coaching programs and sales coaches should focus on cultivating and enhancing intrinsic motivation among coachees, in addition to, developing selling skills. Hence, coaches may need to spend significant time to understand each individuals’ intrinsic motivation (i.e., what internally drives them to sell) and make sure that coaching activities and behaviors provide value towards the coachee’s intrinsic motivation(s). This may help to increase the impact that coaching has on performance among the low and high performers. By enhancing the intrinsic motivation among these groups, for instance, the low performers may begin to exert greater effort towards learning and development and the high performers may begin to exert greater effort towards their personal production.

**Limitations and Future Research**

While the results of this paper offer insight into the relationship between sales coaching and sales performance, there are limitations that are notable. First, future research should investigate other factors that may change the impact of the mechanisms that explain how coaching affects performance. For example, Badrinarayanan et al. (2015) call for more research to examine the “alignment between different leadership styles [e.g., transformational vs. servant leadership] and sales coaching (p. 1097).” Servant leaders’ primarily focus on the needs of their employees, that is, helping each employee succeed by placing the needs of the employee before their own (Greenleaf, 1977; 2002; Jaramillo, Grisaffe, Chonko, and Roberts, 2009). Transformational leaders, on the other hand, inspire subordinates to perform beyond expectations for the collective values and needs of the organization (Bass, 1985; 1990). Transformational leaders use rewards and praise to encourage higher performance (Rafferty and Griffin, 2004). Behavioral dimensions that distinguish transformational leaders from other forms of leadership
includes communicating the organization’s vision, role modeling (e.g., leading by example),
encouraging followers to think outside the box, individualized consideration/attention, and
recognizing and rewarding followers (Bass, 1985; Rafferty and Griffin, 2004). Future research
could examine which, if any, of the two leadership styles is more effective at enhancing intrinsic
motivation and self-efficacy among salespeople. In other words, which leadership style has a
greater impact on motivation and learning as they relate to sales performance and coaching.

Second, future research can identify other potential drivers that explain how coaching
affects performance. Our current model explains for only 39% of the variance in performance,
which suggests that there may be other factors not capture in the extant model. For example,
anecdotal evidence suggest that sales coaches not only motivate salespeople but also hold them
accountable. While it is not captured in the model, future research could examine whether
coaching increases performance by holding salespeople accountable for their actions and
behaviors. Goal-setting theory (Locke and Latham, 1990) may help explain whether effective
coaches enhance salespeople’s’ accountability to and commitment towards goals, thus increasing
their performance.

Third, sales performance was measured subjectively from the salesperson’s perspective.
Not to mention, this study did not look at the dyadic relationship between a sales manager and
salesperson. Future research should examine the dyadic relationship as well as the objective sales
performance record.

Fourth, differences in context may also influence coaching effectiveness. This study was
limited within a business-to-business (B2B) context. Replication studies within a business-to-
consumer (B2C) context is warranted in order to test the generalizability of the dual-process
model outside a B2B environment. These differences may include, for instance, varying price
points, sales cycle, and selling tactics. Moreover, in this study, we looked at salespeople who are coached by their sales manager. But, coaching also happens between salespeople (e.g., a novice with expert salesperson) and with third party coaches (Richardson, 2016). Future research would test the model under those circumstances to determine its generalizability on those type of coaching scenarios.
REFERENCES


Appendix A: Interview Protocol Form

Thank you for taking the time to participate in this interview.

The purpose of this interview is to gain a better understanding of the sales coaching process from the perspectives of both the sales manager and the salesperson. Your response will help us develop strategies that will enhance the interaction between manager and salespeople during coaching sessions. Therefore, it will be mutually beneficial for all parties.

Participation

Your participation is voluntary. The interview is expected to last no more than 90 minutes.

Your responses will be documented by our researcher(s). Your comments will be aggregated with other respondents’ comments anonymously. Your identity will not be attached to any of the stories, suggestions, examples, or comments you make. By signing this attached form, you understand that: (1) all information will be held confidential, (2) your participation is voluntary and you may stop at any time if you feel uncomfortable, and (3) we do not intend to inflict any harm.

__________________________________________________  _______________
Interviewer                                            Date

__________________________________________________  _______________
Interviewee                                             Date
Appendix B: Interview Briefing Guide

Demographic Information

1. What is your gender?
2. What is your age?
3. What is your ethnicity?
4. What is the highest level of education you have completed?

Job-Related Information

5. What is your job title?
   a. If manager, how many salespeople do you manage?
6. What is your primary job responsibility?
7. How many years (estimated) of experience (management and/or sales) do you have?
8. What is your Industry?
9. What products do you sell?

Coaching-Related Information.

Managers:
10. Are you currently responsible for coaching your salespeople?
11. (If yes), How many years of coaching experience do you have?
12. On average, how often do you coach each salesperson?

Salespeople:
13. Does your manager currently coach you?
14. On average, how long have you received coaching from a manager as a salesperson?
15. On average, how often do you receive coaching from your manager?
Appendix C: Interview Guide for Sales Managers

Thank you for your participation today. In this session, I will ask you a series of questions related to sales coaching to help us understand the sales coaching process. If, at any time, you do not feel comfortable with any of the questions that I am asking, please let me know and I will refrain from further probing. Your responses will be confidential. No names will be used in summarizing the data. Only the researchers on our team involved with the analysis of the data will have access to the information.

1. What are your thoughts about coaching?
   • What does coaching mean to you?
   • How is mentoring similar to and/or different from coaching?
   • What are your reasons/motivations for coaching?
   • What situations prompts you to engage in coaching?
     o What are the different occasions where you put on your “coaching” hat?
     o What event occurs that make you coach?
     o What criteria do you use to select coaching opportunities?
     o Who gets coached and why?

2. How does the coaching process occur?
   • How would you describe your coaching approach or style?
   • Describe the typical coaching session? In other words, describe your process of coaching (from the beginning to the end).
     o Is this always the same approach or does it change? If so, how?
     o What do you focus on during the session?
     o What do you hope to accomplish/gain at the end?
   • How do you facilitate learning and/or behavioral change?
     o Describe how learning occurs in the coaching process.
   • How do you facilitate goal accomplishment?
   • How do you measure the effectiveness (success) of the coaching session?
     o What do you consider an effective coaching session?
     o What do you measure before, during, and after the session?
     o How many coaching sessions do you usually spend with each salesperson?
   • What factors affect the effectiveness of the coaching session?
   • What are other benefits of coaching to the salesperson?
   • What are other benefits of coaching to you as a manager?

3. What skills and/or strategies do you use in the coaching process?
   • What communication skills and strategies do you use?
     o What communication skills do you use while coaching?
     o What strategies do you use while coaching?
     o How do you get information from the salesperson?
     o How do you provide feedback to the salesperson?
     o How do you support and challenge the salesperson?
   • What other skills and/or knowledge are important to be an effective coach?
   • How does your background and experience affect your coaching abilities and behaviors?
○ What makes you an effective coach?
Appendix D: Interview Guide for Salespeople

Thank you for your participation today. In this session, I will ask you a series of questions related to sales coaching to help us understand the sales coaching process. If, at any time, you do not feel comfortable with any of the questions that I am asking, please let me know and I will refrain from further probing. Your responses will be confidential. No names will be used in summarizing the data. Only the researchers on our team involved with the analysis of the data will have access to the information.

1. What are your thoughts about coaching?
   • What does coaching mean to you?
   • How is mentoring similar to and/or different from coaching?
   • What makes an effective coach?
     o Describe your ideal coach.
     o What background or experience would make a good/effective coach?
     o What skills or knowledge are important to you for a coach?
     o What behaviors do you want your ideal coach to exhibit?

2. How does the coaching process occur?
   • How would you describe your manager’s coaching approach or style?
     o How do you feel about his coaching style/approach?
   • Think about the last time you were being coached. Think about a “good” coaching session. Describe the coaching session (from beginning to end).
     o What made it a good coaching session, in your opinion?
     o What did your manager do that you like or did not like during that session?
     o What tactics or strategies did your manager use?
     o What did you hope to accomplish/gain at the end?
   • Think about the last time you were being coached. Think about a “bad” coaching session. Describe the coaching session (from beginning to end).
     o What made it a bad coaching session, in your opinion?
     o What did your manager do that you like or did not like during that session?
     o What tactics or strategies did your manager use?
     o What did you hope to accomplish/gain at the end?
   • How do you like to be coached?
     o What affects your coaching preference?
   • How did your manager facilitate learning and/or behavioral change?
   • How did your manager facilitate goal accomplishment?
   • How do you measure the effectiveness (success) of the coaching session?
     o What do you consider an effective coaching session?
     o How many coaching sessions do you usually spend with your manager?
   • What factors affect the effectiveness of the coaching session?
   • What are other benefits of coaching to you?

3. How do you respond to coaching?
   • What are your reasons/motivations for being coached?
     o What situations, events, or experience makes you want (or prompts you) to be
coached?
• What makes you resistant and/or open to coaching?
  o How does your background, experience, or any other personal characteristic impact your response/reaction when you are being coached?
When is unsolicited coaching okay? Why?
Appendix E: Conceptual Model (Essay 1)

Factors That Affect Manager’s Decision to Coach (or Coach More)
- Perceived Salesperson’s Coachability
- Salesperson’s Level of Performance
- Salesperson’s selling experience

Manager’s Coaching Behaviors
- Role-Modeling Behaviors
  o Listening
  o Asking Questions
  o Providing Feedback
  o Showing/Teaching
  o Observing In-The-Field (e.g., Ride-Along, Listening-In)
- Helping Behaviors
  o Providing Resources (e.g., leads, information)
  o Immediate attention to requests
  o Sacrifice of time
  o Team/Collaborative Selling

Trust Towards Manager
- Perceived Empathy
- Perceived Caring
- Perceived Adapting
- Confidence in Manager’s Selling Knowledge, Skills, and Ability

Coachability

Outcomes of Coaching (That Drive Sales Performance)
- Learning New Selling Knowledge, Skill, or Ability
- Problem-Solving
- Goal Clarity/Accountability
- Motivation/Inspiration

Sales Performance
December 6, 2016

Carlin Nguyen
Marketing
4202 E. Fowler Avenue, BSN 3403
Tampa, FL 33620

RE: Expedited Approval for Initial Review
IRB#: Pro00028717
Title: Exploratory Study of Sales Coaching

Study Approval Period: 12/5/2016 to 12/5/2017

Dear Mr. Nguyen:

On 12/5/2016, the Institutional Review Board (IRB) reviewed and APPROVED the above application and all documents contained within, including those outlined below.

Approved Item(s):
Protocol Document(s):
Protocol Guideline - Sales Coaching - Version 1

Consent/Assent Document(s)*:
Informed Consent - Sales Coaching - Version 1.pdf

*Please use only the official IRB stamped informed consent/assent document(s) found under the "Attachments" tab. Please note, these consent/assent document(s) are only valid during the approval period indicated at the top of the form(s).

It was the determination of the IRB that your study qualified for expedited review which includes activities that (1) present no more than minimal risk to human subjects, and (2) involve only procedures listed in one or more of the categories outlined below. The IRB may review research through the expedited review procedure authorized by 45CFR46.110. The research proposed in this study is categorized under the following expedited review category:
(6) Collection of data from voice, video, digital, or image recordings made for research purposes.

(7) Research on individual or group characteristics or behavior (including, but not limited to, research on perception, cognition, motivation, identity, language, communication, cultural beliefs or practices, and social behavior) or research employing survey, interview, oral history, focus group, program evaluation, human factors evaluation, or quality assurance methodologies.

As the principal investigator of this study, it is your responsibility to conduct this study in accordance with IRB policies and procedures and as approved by the IRB. Any changes to the approved research must be submitted to the IRB for review and approval via an amendment. Additionally, all unanticipated problems must be reported to the USF IRB within five (5) calendar days.

We appreciate your dedication to the ethical conduct of human subject research at the University of South Florida and your continued commitment to human research protections. If you have any questions regarding this matter, please call 813-974-5638.

Sincerely,

Kristen Salomon, Ph.D., Vice Chairperson
USF Institutional Review Board