

The 4T Alignment Sales Strategy – A Model and Case Study

By Ahmed F. Taher

The paper reveals the 4T alignment sales strategy model. The article provides an account of its implementation in restructuring a multinational pharmaceutical company's sales organization. The new structure matches the physician with the salesperson using their predisposition toward innovative or classic drugs. The alignment went deeper to include the tools designed as sales collaterals used by the medical representatives in their presentations and their training. Matching salespeople and physicians via their disposition toward innovative (or conventional) drugs enhances engagement's value. This matching improves the promotion of the innovative (or established) drugs in the company's portfolio. The alignment sales strategy involving the target audience, product mix, medical reps, training, and sales tools produced the growth spike that investors demand and management aspires.

SALES STRATEGY: THE MISSING LINKS

The majority of sales research addresses how to improve the individual salesperson performance (Verbeke et al. 2011; Morgan 2012). The underlying assumption is that the sales team performance is the sum of its members' performance. It seems apparent that this perspective omits the impact of sales management (Katsikea et al. 2007; Piercy et al. 2009) or the contributions of aligning sales and marketing (Arrawatia 2019; Hanekom 2019; Kotler, Rackham, and Krishnaswamy 2006; Pal 2019) along with the influence of other functions within the organization (Agnihotri, Yang, and Briggs 2019; LaForge, Ingram and Cravens 2009; Gruber et al. 2010).

A gap appears to exist when considering sales strategies that focus on customer centricity, orientation (Habel et al. 2020), and predispositions. Cron et al. (2014, p.485) focus on how top-level executives use mental models of sales force performance to simplify the issue of sales force strategy, and defined "five customer-relating aspects as core sales force capabilities: new customer acquisition, customer relationship development, customer trust-building, customer needs responsiveness and customer retention." They emphasized the need for a sales strategy that directly addresses these issues

Salesforce strategy refers to "the set of strategic decisions that determine the areas on which the sales force will focus its attention and the role of the sales

force in creating customer value that is consistent with the overall strategy of the firm and/or business unit" (Cron and Cravens 2010, p.21). Along those lines, Panagopoulos and Avlonitis (2010) have sales strategy with four aspects focusing on the customer: customer segmentation, customer prioritization, and targeting, relationship objectives and selling model, and sales channels. Building on this framework, this paper presents a new alignment sales strategy model and its application to several cases.

THE 4T ALIGNMENT SALES STRATEGY MODEL

The model is all about synchronizing the sales planning around the *target* customers, the sales *team*, the promotional *tools* they are provided, and the sales *training* they receive. The paper covers each aspect of sales planning, as well as their alignment. Some examples from cases, including the leading case on the pharmaceutical industry, demonstrate the application.

THE TARGET CUSTOMERS

The underlying wisdom in sales has always been that it is much easier to help customers buy what they are looking for than to sell to them what you want to sell. That requires a concerted effort from the marketing or product management team to sharply identify the target segment that should be interested in each product or product form within the product line. That will, in turn, be based on a qualitative and quantitative market segmentation research. In that research, the market segments should be identified. Their underlying needs,

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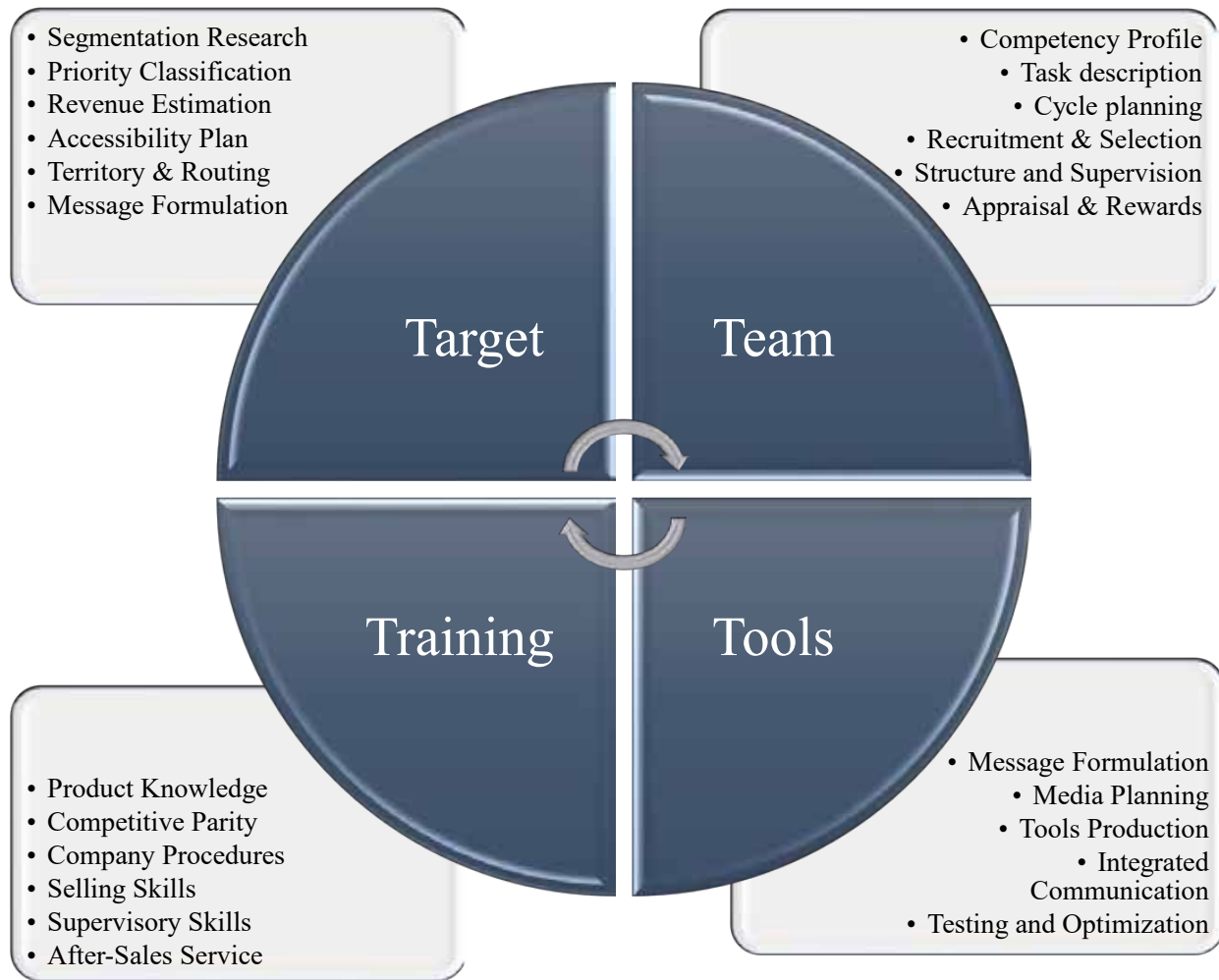


FIGURE 1: THE 4T ALIGNMENT SALES STRATEGY MODEL

motivations, and unmet needs should be clearly defined and profoundly understood in qualitative research. The segments should be appropriately sized through quantitative analysis, which also validates qualitative research findings.

Consequently, the product portfolio should be revisited to identify the products that match the target segment's needs and unmet needs. Some fine-tuning for the selected products may be needed to produce the perfect match, albeit even in the package design. The size of the target segment and the magnitude and quality of competition will determine the potential sales it can produce and the number of resources to dedicate to it.

Resources are finite, particularly the salespeople. In this process, the customers' classification within the target segment relies on ABC categories and resource allocation made accordingly.

Revenue estimates derive from each category. Alignment of revenue projections with sales hours/efforts and other resources follow the target segment. Another research and analysis outcome sought is determining the best option for accessing members of this target segment. That includes where, when, and how salespeople should reach customers so that they are in the right mind and mood to listen and take the decision to adopt the sales propositions.

All the insights about accessing the target audience will transpire in the territory and routing plan. Sales territories are delineated to enclose equitable (not equal) workloads for each salesperson. The exact workload to serve an 'A' customer is determined, as are the workloads for 'B' and 'C' customers. The development of the territories has a goal of including enough of each type while producing a fair sales quota. This effort may result in some territories having a geography too large to travel. This travel issue may require adjustments to sales targets and compensation structure.

Finally, the analysis provides the product managers with insights to build their sales and marketing messages. These messages must address the needs and motivations of the target customers clearly and effectively. The messages should be creatively formulated to achieve 4 goals; attract the customer's attention, explain the selling points, convince the customer, and impress them, so they remember the benefits until they decide to buy. If the product is unique enough to address an unmet need, that should be brought to the sales message's foreground. In all cases, the message should be single-minded and tuned to the client mindset.

ALIGNING THE SALES TEAM

Given the clients' attributes and interests in each targeted segment, the sales manager considers the compatibility of each and every individual in the sales team to the target client characteristics. The salesperson's disposition informs the alignment and assignment to the target segment. Refinement of measuring the tendency of salespeople through a psychometric assessment is a worthy investment. The human resources department likely is to be part of this exercise.

The sales manager/director is essential in the restructuring of the sales team, including the supervisors. New members may have to be recruited to reflect the change in the effort needed to serve the defined segments. Most importantly, new targets need to be devised, likely leading to changes to compensation or even a new compensation scheme. Again, the human resources team should help here. The appraisal cycle and tools should be tailored to the new mission of each sub-team.

The marketing and/or brand management team are the next participants in this process. These teams formulate the positioning of the products to be offered to the clients in each segment. The messages must be developed to address the needs and unmet needs defined in the research, and these messages integrated into a pitch that must be adopted by the teams. It is useful to have the product manager pose as the client in the typical sales call rehearsals.

THE TOOLS AND COLLATERALS

The first task is to finalize the message that is to be communicated to the target audience. In most cases, the sales efforts will receive support from the activities of marketing. These efforts should focus on increasing the effectiveness and efficiency of the sales efforts. It is mandatory that the marketing and sales messages integrate, synergize, and complement one another. Marketing uses media to disseminate their messages, and the sales manager's feedback on the media plan may add unique insights.

The marketing team also produces the collaterals to support the sales teams to explain the message to clients. The tools should be tailored to the target segment. Different target audiences have different tastes, vocabulary, and format appetite for technology beyond the generic message. Adapting these communications to those preferences is appropriate. Still, the messages should maintain a single mindset that reflects the sales campaign's mission and theme. Finally, optimize all tools and collaterals for efficiency and tested with a sample of clients from the target segment to validate the marketing and sales teams' assumptions.

TRAINING

With the reconfiguration of the sales strategy, confusion and uncertainty can overwhelm the sales team, supervisors, and management. It is crucial to increase the training to accommodate the new members, new approaches, new messages, and new tools. The product knowledge may not fundamentally change, but the presentation and the means to support the presentations likely see a new design, reinforcing the need for training. Practice and roleplays are best practice approaches to prepare the sales team for the latest presentations.

With the redefined market segments, the competition sometimes changes too. When Apple declared education and arts as its key segments, they also declared new competitors who were already serving these segments with dedication. The company ought to benchmark the modified competition to maintain its sales strategy's competitive parity and create points of differentiation. The company may have to review its procedures to meet and exceed the expectations of its clients. That adds another item to the training plan, which includes selling skills, supervisory skills, and aftersales service.

NORMAL IS NOT GOOD ENOUGH

The case is a well known multinational pharmaceutical company that had a unique portfolio of products. Some products are decades old but still sell very well, particularly with classical doctors who prefer to play it safe with their patients. These products have developed in several forms and became well known even for the patients. Some became household brands as pain killers and gentle treatments with minimal side effects. These products continue to result in significant revenues. They are seen as cash cows that require little or no marketing effort to continue to generate cash.

However, the product portfolio also included some 'stars'; new molecules that require market investment and sales energy to shoulder onto the incumbent's market share. These innovative drugs are dark horses that come from behind to become winners. These are the brands that receive the 'bets' of the executive team. In some cases, the incumbent competitor is from the same company's old portfolio. These incidents are case of cannibalization that the company cannot avoid.

In the current system, the sales team is organized geographically. Each salesperson has predetermined routes to provide proper and weighted coverage to the assigned doctors. Sales would visit them with a frequency proportionate to their prescription potential and patient profile. 'A' doctors are seen weekly, 'B' biweekly, and 'C' every four weeks. The quarter extends for 12 weeks. The 13th week sees the salesperson retraining and reviewing the quarterly targets, also called the cycle plan. The marketing team and product managers are there to ensure the modified

messages about each product in the 'line' are digested and rehearsed well.

In this case example, sales targets are being met. Management, though, felt the growth trajectory did not meet investors expectations. Another issue arose as the sales team saw a conflict between the company's promotion of two drugs prescribed for the same indications. Salespeople mentioned the confusion doctors when the portfolio includes a new drug and a drug with a long history in the company portfolio. This condition would even confuse the sales team. Some sales team members began taking unilateral decisions to talk about one or the other depending on their personal assessment of the doctor's probable preference.

These issues led to a review of the sales strategy, assessment of the situation, and a proposal of viable solutions. Assessment indicated conflicting messages and goals due to a lack of proper planning of the sales effort. A task force applied the 4T sales planning model to this situation. The cases demonstrates implementation of the 4T model. The model thrives on its simple logic and ease of application. The results almost always draw the same remark: 'why didn't we think of that before?'.

RECONFIGURING THE TARGET SEGMENT

First, the task force prepared a list of all the doctors the team visited. In the next step, each sales member classifies the assigned doctors into three categories: innovation-loving early-adopters, classic-prescribing laggards, with the third being the indeterminate group. These are the doctors that did not clearly identify into one of the first two groups. To cross-validate, supervisors do the same classification. Next is a comparison and an effort to resolve any discrepancies. The goal is 2 clear segments in which 80% of the doctors can be classified. Market research for the analytic insights listed above created the additional information needed.

ALIGNING THE SALES TEAM

Aligning the sales team to the two groups of doctors begins with the supervisors. The supervisors classify members of their own sales teams into two groups. One group includes the 'expressives' who were excited about innovations, dressed progressively, and

adopted the latest gadgets. The other group consists of the 'traditional' members of the sales team. These salespeople prefer the status quo and hesitate long before accepting change. As with the doctors, some salespeople didn't fall clearly in either category. Using the sales managers helped approximate their group affiliation and to validate the complete classification.

These 'expressives' come from research insights, the sales manager, and the human resource manager. They are ideal for addressing the early adopters. These salespeople channel their natural excitement about novelties and match the doctors that adopt innovative products. These doctors prescribe innovative drugs ahead of their peers to provide maximum efficacy to their patients. The other sales team's competency profile addresses the classical laggards and channel their natural inclination for maintaining the status quo to commit to the well-established products to ensure the safety of their patients.

The outcome was to classify the full product line into two lines. Product line A included the innovative products that were relatively new and still in the patent-protected timeframe. Product line B consists of the products that were no longer protected and out in the open market, competing with cheaper generics but still doing quite well. The value of alignment becomes evident over time and through each iteration of the sales cycle.

The product managers join the planning exercise to develop the task description: what exactly should the salesperson in each team-product line do? The eight hours of daily work are carefully utilized to maximize the sales yield. The innovative line product managers independently think of creative tools to match the expressive doctors and salespeople.

One such innovation is the plan of the four cycles of the annual year. The sales messages are different yet complimentary each quarter, and the task description would also be revised. Each cycle would build on the previous cycle, not repeat it. Each cycle introduces a new angle for communicating the benefits of each product line. Throughout the sales organization, visualization of the salesperson's life and activity, each day and each cycle begins. A consistent vision, including appearance, begins around how salespeople should dress, walk,

and talk. Once this is achieved, measurement of team members against the vision commences

One suggestion, interview the sales team anew to make sure they meet the new task descriptions. Adjustments such as training or in the extreme replacement may be necessary in this interim step. The positive results at this interim point of the case study led to visible increases in motivation. A couple of members were reclassified after the round of interviews from one team to the other. A consensus was reached that no new members were needed. The structure was completed. The supervisors were smoothly assigned. Their roles as supervisors were also reviewed and documented in the new structure.

Finally, the sales manager took over the lead and set the targets and performance appraisal criteria for both the team and the supervisors. The targets were built bottom-up after each sales member was assigned his list of doctors and routes for the first cycle, all 12 weeks. The number of prescriptions expected of each doctor was agreed and added to aggregate each member's quarterly and annual target and, consequently, each supervisor and the company. The reward system was set to reflect both the performance (effort) and the sales target achievements.

THE TOOLS AND COLLATERALS

Simultaneous with the sales team alignment is the development of sales tools and sales collaterals. The sales and marketing machine aligns. The product managers use the research insights to formulate the sales and marketing messages for each cycle. Flipcharts were a key attraction where each product manager proposes the messages relevant to his/her product line. The team moved to the second level to align all the messages with each other and the company strategy.

The marketing director brought his template matrices crossing the target markets with the product lines, different media, social media, and sales collaterals (tools). In this case study, a byproduct of the alignment was the increase in creativity. Additionally, realistic appraisals developed around setting each product's budgets, target segment, and sales collateral. For the next few days, the marketing director collected the matrices and discussed them again to iron out all the

anomalies and conflicts. The final matrices became the foundation of the media plans. The finely tuned alignment of the tools with the target segments and the sales teams became a challenge and a goal.

Then comes the optimization exercise to produce the most efficient and effective integrated marketing communication plan. The social media and the digital tools online and off-line have taken the IMC to a new level. Big data analytics and artificial intelligence in real-time have added new levels of sophistication and competitiveness. Making sure that all the sales messages were integrated across media and platforms. Each product manager wrote creative briefs for the communication agencies to get working on designing and producing the right sales collaterals for the specific target group. Digital and interactive presentations were prepared, and plans were made to split the web-presence of the two product lines under separate pages and URLs.

In the meantime, the sales managers were preparing for the cycle meeting with enthusiasm. The sales messages for each product had to be aligned with the team that will promote it to the target doctors. The tools had to also match the target doctors. The messages and planned activities were spread over the 12 weeks of the sales cycle so the doctors can follow the logic, feel the pace, and stay interested. The training methods were also selected and well-planned to create collaborative mindsets among the doctors (Kaski, Alamäki, and Pullins, 2019). The Sales Director reviewed all the plans very carefully to make sure the communication was fully integrated.

One final step that he asked the product managers to do, was to recruit 2 young doctors from each segment and asked them to review the planned messages, the mockups of the sales collaterals, and the semi-structured script that the sales managers had prepared for the sales calls. This initial testing proved to be of great value. The doctors picked up some logical flaws and some words here and there that were not to their liking. They even laughed about some terms that didn't give the intended meaning. They surprised the managers with very valid insights about the timing and the order of the messages within the cycle.

TRAINING

It was time for the sales-cycle training. The director introduced the new structure of the sales teams and the new segmentation. The consensus view was that the alignment was a new beginning and explained the five-day meeting schedule. The sales training usually has three main components, product knowledge overview, selling skills including the use of the new tools, and review of the company policies and procedures and compliance requirements. This time the product knowledge was more detailed and different. The positioning of each product was exact and focused on the expectations of the targeted doctors.

That positioning became even more pertinent in the discussions as the sales managers moved on to explain the competitive parity. The differences went beyond the typical better onset and fewer side effects to focus on new angles that seemed tertiary before. The sales team engaged with insightful questions and sometimes put their managers on the spot. Still, the outcome was certainly different and inspiring. As the managers revealed the tools, the 'new beginning' promised by the sales director was slowly unfolding. The dynamics were very constructive, and the positive energy filled the room.

The Sales and Marketing Director created a task force to revise the sales policy. The new approach and digital tools were not compatible with the existing systems that have been in place for years. The new sales policy accommodated online technology and acknowledged the new media. From now on, the doctors were also sharing their opinions interactively and collectively online. The product managers no longer had full control over the message. Doctors talked to the salespeople in their clinics and spoke to each other in their groups and across platforms. Many would share on Facebook and other social media platforms an opinion posted by one doctor on Twitter. The product manager is now only one voice among hundreds of doctors exchanging ideas and experiences.

The selling skills set was now different. It included discussing social media comments that the salesperson may not have read or seen. It also included questions and challenges in the form of short videos shown to the

salesperson from a mobile or tablet during the visit. The sales ecosystem now provides product knowledge, the competitive parity, the company policy, and the target doctors. Besides, it also included any content that can be retrieved online and brought into a conversation. The salespeople are now warriors carrying weapons of logic and knowledge in an everchanging landscape. The selling skills training included live simulation with the two young doctors roleplaying themselves with some variations on their social style, and some surprises built into their managers' mock sales call.

The drills included the sales supervisors as well, once as salespeople, and another time as supervisors with their managers. Their supervisory skills also went through an evolution process. the monitoring techniques went far beyond the classical self-reports and double visits. Technology now plays a pivotal part in the evaluation of salespeople's performance. The tablets record the GPS of the salesperson and match it with the time, it will record and report all the comments her client makes online regarding the company, the product, or the medical rep. the change in the doctors' attitudes can be measured from their online communication on social media platforms, even if it is not with the medical representative.

The after-sales undercurrents have also changed directions. The technology allows, and the doctors expect instant gratification. Answers are expected instantly. Extensive material with audiovisual collaterals can be sent from the medical rep's tablet in real-time. The doctor's contact is not by any means limited to the sales visit, but is possible anytime anywhere online, and is open beyond the medical rep to include almost the whole company. The response cannot be called 'feedback' anymore because it can be available to the entire target segment, competition, and even media to see, hear, and watch. The global online ecosystem is wide open, which some companies see as a major threat. Others see it as a formidable challenge. Still, others view it as a great opportunity.

MANAGERIAL IMPLICATIONS

The 4T alignment sales strategy model is a conceptual model that ties the four key elements of the sales process into a framework that helps sales and

marketing directors plan, organize, manage, and assess performance. All the hard work of marketing and sales boils down to the few invaluable minutes that the salesperson spends with the target client. It is in those few minutes that all the training and tools come together with the personal characteristics of the salesperson and the client to interact to open a window of opportunity or a door to complications. The alignment of all the elements around the needs and characteristics of the target doctors creates value. It makes the results more remarkable and reliable (Butterworth, ed. 2019).

The results of its implementation in the example given cannot be accurately disclosed for confidentiality. Still, sales grew significantly, almost three folds of the typical annual increase. This increase used the same sales team, supervisors, sales directors, product managers, and sales and marketing directors. Only the re-segmentation of the installed base of customers (Gicquel and Lambert 2020) and the sales team's realignment, tools, and training to fit the target market segments made all the difference. Prioritizing and targeting customers, having clear relationship objectives and development paths, and developing a selling model as recommended by Panagopoulos and Avlonitis (2010) supported by the relevant tools and training produced brilliant and profitable results. The innovative drugs portfolio was acquired two years later by a major competitor at a very profitable transaction for both the seller and the buyer.

Other examples from many industries can be given. In the cement industry, recruiting the sales team from the same geographical area of the traders and training them well to meet the needs of their clients enabled them to build a strong tie that they leverage in difficult times like the coronavirus year. The tools in this case were creatively revised, to include a call center for rapid response to short orders, a software to track the shipments, and access to a sports and social club where dealers go for their leisure and social occasions.

A bank that intended to focus on the underserved contracting business hired a just-retired CFO with 30 years of experience in that field as a subject matter expert to guide the initiative to implement the 4T framework. The taskforce did the research, created tailored offers, developed special tools to explain the

offer including an app to instantly calculate the interest on loans, and recruited and trained a dedicated team to address contractors. The return on this investment in this initiative exceeded the expectations of the board who approved it by threefolds.

In the retailing industry, a chain of patisserie stores had about 60 outlets in high, medium and low socio-economic class (SEC) communities. All the stores were similar, but some did better than others, without a clear explanation. After analyzing item sales and consumer research for each store, the 4T sales strategy task force set the solution. The stores were classified to three types based on the local customers of each store. Each SEC had its preferences not only in the product mix but also in the staffing of the store and its display methods. When all the factors of the sales strategy were aligned, all the stores showed higher performance, and the chain grew profitably to cross the 100 stores line in less than 2 years.

The new ecosystem of digitization and artificial intelligence will add layers of complexity and also open many windows of opportunity for innovation in sales strategy (Singh et al., 2019). The advent of the internet with all its implications of owned media, paid media, earned media or simply social media place the sales call on the public domain for all parties to examine, engage, and use to make their point. This means that the stakes are much higher, and you can win or lose big-time (Ameer and Halinen 2019). It also means that timing is critical. In a few minutes, what seemed like a winning streak may turn into a losing one. Therefore, deploying public relations and crisis management expertise is a must in this new ecosystem. The proposed customer-centric approach with the service experience innovation dynamics can enable strategic account management (SAM) to function as a value co-creation selling model (Pilon & Hadjielias 2017). More experiential touchpoints in the shared-economy-based platforms offer opportunities for co-creation of value that should be explored and exploited (Schiavone et al. 2020).

Finally, sales and marketing must join forces and align more than ever before (Johnson, Matthes and Friend 2019). Monitoring the sales team and reading the ecosystem real-time is not a luxury or a recommendation; it is a matter of survival. Planning is

still valid, but only if it comes with the flexibility to revise the details every day. Customer intimacy will remain as the compass of sales strategy. Still, the tactics and the timings are subject to too many variables, none of which are easily predictable anymore.

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