



## Impact of salesperson macro-adaptive selling strategy on job performance and satisfaction



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### ABSTRACT

Drawing on the tenants of the adaptive strategy paradigm and configuration theory in the management and marketing literature, a model introducing the concept of salesperson macro-adaptive selling strategy that considers the overall selling environment, as contrasted with micro-adaptive selling tactics tailored to a specific customer, is introduced and investigated empirically within the context of the financial services industry. Using a widely accepted management theory typology—*prospector*, *defender*, *analyzer*—the model places macro-adaptive selling strategy into the sales performance literature as an expanded more holistic understanding of strategies influencing salesperson performance. Findings indicate significant direct and indirect effects on sales performance and job-related incomes, including job involvement, effort, and job satisfaction, for salespeople using different macro-adaptive selling strategies.

### 1. Introduction

The sales literature consistently suggests that salesperson performance is largely a function of the salesperson's personal role definition, knowledge, effort, and strategies for “working smarter” with individual prospects and customers (Anderson, Dubinsky, & Mehta, 2008; Rapp, Ahearne, Mathieu, & Schillewaert, 2006; Weitz, Castleberry, & Tanner, 2003). Sales organizations are encouraged to clearly define and manage the salesperson role in order to facilitate job performance and enhance satisfaction for the salesperson as well as for targeted customers (Singh, Verbeke, & Rhoads, 1996; Walker, 2013). Salespeople who are more “sophisticated” in their selling knowledge and skill set are expected to be more successful in adapting to the wants and needs of specific customers, and thereby more productive (Weitz, Sujan, and Sujan, 1986). Therefore, salespeople who “work smarter and harder” are expected to be more productive than those who merely “work harder” (Rapp et al., 2006; Sujan, 1986). Despite these consensus views, research concerning the strategic drivers of sales performance remains scarce. From a strategic perspective, the sales literature is quite ambiguous in articulating the overall direction of salesperson effort. More specifically, what does it mean to work smarter? Does this apply to interactions only with targeted prospects and customers, or to understanding the larger, overall external selling environment? What does it mean to adapt strategically across customers and product lines? Is there an overall

salesperson perceptual framework that takes into account a more macro-marketing or selling strategy and applies it generally across all the salesperson's interactions with prospects and customers? What is the appropriate content of salesperson knowledge? Are there multiple pathways, or personal success strategies, including both micro- and macro-approaches, that can lead to sales effectiveness? Answers to directional questions such as these are essential to identify and understand the strategic drivers of the individual salesperson's sales performance and to provide actionable insights for sales managers in increasing overall sales force productivity.

Since a great deal of research has already focused on micro-adaptive selling strategy, our purpose is to examine the largely overlooked effect of salesperson macro-adaptive selling strategy, as a “personal success” stratagem, in driving sales performance. More specifically, our interest is in identifying macro-level strategic drivers of individual salesperson performance across customers, products, and marketplace conditions, rather than just the micro-adaptive content of salesperson knowledge or specific behavioral actions—such as question-asking, or persuasive tactics (Weitz, 1981)—in dealing with a particular prospect or customer. More specifically, our focus is on how salespeople strategically adapt to their personal *perceptions* of different market environments and conditions, such as the holistic view of prospects, customers, competitors, and product opportunities found in their sales territories. Parallel with the suggestions of Churchill, Ford, Hartley, and Walker (1985), we

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investigate the effects of salesperson macro-adaptive selling strategy on job-related outcomes such as sales performance, job involvement, work-related effort, and job satisfaction. Direct effects of salesperson macro-adaptive selling strategy on sales performance, and indirect effects through the mediation of job involvement and work-related effort, are expected. In addition, the degree to which salesperson perceived *environmental uncertainty* drives the selection of a salesperson's macro-adaptive strategy is examined. Finally, a direct effect of sales performance on job satisfaction is expected, as well as an indirect effect through job involvement and work-related effort (Brown & Peterson, 1994; Singh et al., 1996; Singh & Das, 2013).

## 2. Conceptual framework and hypotheses

Consistent with prior research (Brown & Peterson, 1994; Churchill et al., 1985), our conceptual model considers the determinants of sales performance at the individual salesperson level. Specifically, we examine the effects of salesperson adaptive selling strategy, as a personal success strategy, on sales performance in the context of an established model of sales performance. Conceptual roots for our study trace from Belasco's (1966) emphasis on the role aspects of the sales job, through Walker, Churchill, and Ford's (1977) model of salesperson motivation and performance, to Churchill Jr et al.'s (1985) and Brown and Peterson's (1994) meta-analytic reviews of the foundations of sales performance and job satisfaction. Other studies have examined the mediating effect of work-related effort, defined as the “force, energy, or activity by which work is accomplished” (Brown & Peterson, 1994) on sales performance, as well as the facilitative effects of an organizational climate that is supportive, challenging, and intrinsically motivating in generating appropriate levels of job involvement and work-related effort (Brown & Leigh, 1996). The foregoing research findings have particular relevance to the present study by pointing to the potential role of the strategic aspect of salesperson role direction – in the context of job involvement and work-related effort – in driving performance and job satisfaction.

What is salesperson macro-adaptive selling strategy and what role does it play in driving salesperson effectiveness? Salespeople have been exhorted to work smarter by focusing on *micro-level* tasks that are highly relevant to sales effectiveness in a particular sales call, including adopting a sales presentation/demonstration strategy tailored to the customer, adapting to the customer's communication style, or using specific persuasion tactics based on perceived needs (Ingram, Laforge, Avila, Schwepker, & Williams, 2014; Davies, Ryals, & Holt, 2010, Sigauw, Brown, & Widing, 1994; Spiro & Weitz, 1990). However, it must be recognized that success in the sales role also involves *macro-level* strategic choices on the salesperson's part as well, particularly in entrepreneurial sales contexts. Entrepreneurial selling is usually done for smaller firms and can be sharply different from selling for a large corporation where the salesperson is supported but also restricted or controlled by an entire marketing organization that may include departments of specialists in marketing research, product/brand management, advertising/promotion management, and customer service. By contrast, entrepreneurial salespeople tend to be more independent and “on their own” to “produce sales” in the best way they can figure how. Entrepreneurial salesperson are commonly found in the insurance industry which comprises many small “mom and pop” agencies.

Based on their individual perceptions of the larger selling or macromarketing environment, most salespeople make strategic choices as to the customer segments they target, the products they choose to present or sell, the amount of personal time allocated to learning about and developing new product opportunities and selling approaches, and the amount of time and effort they allocate to servicing existing customers. In other words, salespeople make a variety of strategic choices in terms of how they define the scope and nature of their most appropriate personal success strategem. In striving to be successful, salespeople attempt to adapt strategically to the exigencies of the

marketplace by defining their strategic domain in terms of its geographic, customer, and product scope. Subsequently, they configure a plan of action, or navigational strategy, to be successful in this selected domain. Thus, in a fashion similar to that posited by configuration theory (Vorhies & Morgan, 2003), a salesperson's effectiveness can be expected to reflect the degree to which the sales domain strategy and the sales navigation plan are suitably configured.

Today, thanks to telecommunications technology, salespeople have become increasingly empowered and independent from their company headquarters. Salespeople are more like “field marketing managers” or “customer relationship managers” in terms of the decisions that they must make while interacting with prospects and customers. Recognizing that their salespeople are the ultimate customer relationship managers, many companies have provided them with increased authority and responsibility. Along with this increased empowerment has come more control by salespeople over their own personal success strategies. However, sales roles still vary considerably in the degree of latitude that salespeople have to set their own strategic direction. In entrepreneurial selling contexts, such as where the salesperson is an independent agent or producer paid largely on a commission basis, the salesperson is personally accountable for his/her sales results. Even in seller organization-buyer organization boundary spanning types of sales jobs, the salesperson may have considerable latitude in making strategic choices in the domains of customer selection, product emphasis, and territory management. However, in tightly defined and controlled sales force contexts, many of these decisions may be made essentially at the organizational level. In these latter situations, emphasis is more likely to be placed on role clarity and sales force control to ensure that the firm level sales strategy is understood and implemented in the field (Churchill et al., 1985; Miao & Evans, 2013). Our interest is primarily in the entrepreneurial and boundary spanning contexts where the salesperson is the principal unit of analysis and decision making. That is, we are interested in the sales contexts in which a salesperson's job performance is significantly impacted by his or her strategic domain and navigation decisions in attempting to adapt successfully to the various marketplace opportunities and challenges in their sales territories. Hence, we develop the concept of *salesperson macro-adaptive selling strategy* as the focal construct in our model. As noted earlier, the extant sales performance literature does not provide much guidance for defining salesperson adaptive selling strategy from a macro perspective. However, there is a parallel literature that examines strategic adaptability at the firm level that has received considerable attention among marketing academics (Matsuno & Mentzer, 2000; Vorhies & Morgan, 2003). Given our focus on contexts in which the salesperson operates as an independent decision-maker, the general tenants of this strategic adaptability paradigm seem relevant in framing our research problem and hypotheses.

The challenge for decision-makers, including boundary role spanning salespeople and independent sales agents, is developing a personal success strategy that incorporates, articulates, and reflects the perceived overall selling environment as defined by the decision-maker (Matsuno & Mentzer, 2000; Miles & Snow, 1978). The core idea is that the independent salesperson decision-maker must deliberately develop a strategic orientation that fits the selling environment, where strategic orientation includes a planned pattern of *entrepreneurial*, *engineering*, and *administrative* choices that guide subsequent behavior (Miles & Snow, 1978; Conant, Mokwa, & Varadarajan, 1990). Defined in terms of our sales context, the *entrepreneurial problem* would involve the selection of a market domain, a customer domain, a product portfolio to sell, a marketplace intelligence strategy, and personal posture on adaptability and change management; the *engineering problem* would involve the specification of intended selling and technology capabilities and approaches, including the degree to which the salesperson is willing to learn about new technologies and sales practices, the breadth of the selling approaches employed, and how flexible the salesperson would be in employing new approaches; and the *administrative problem* would

involve the configuration of an appropriate planning horizon, a risk management posture, a personal administrative model (time and territory management procedures), and a set of performance goals and control processes stressing a relative emphasis on effectiveness and/or efficiency (Mullins, Bachrach, Rapp, Grewal, & Beitelspacher, 2015). In terms of achieving success, it is important that the selected strategy appropriately fits the external marketing environment. Furthermore, internal consistency among the entrepreneurial, engineering, and administrative aspects is critical. As Vorhies and Morgan (2003) note, configuration theory posits that the proper constellation among the entrepreneurial and the organizational aspects (the engineering and administrative models) of a strategic orientation yields superior performance.

The tenants of the macro-adaptive strategy model seem particularly relevant to our research for several reasons. Sales roles are often quite entrepreneurial and flexible in their role content and configuration. Moreover, salespeople have to balance new business opportunities, customer mixes, competitive challenges, and product mixes, as well as personal time and effort priorities. Finally, salespeople are often rewarded only or mainly when they earn commissions for sales production, customer satisfaction, or profit contribution. Under these circumstances, salespeople are subject to several pressing choices, such as: what markets and customers should I serve (selecting a product-market domain); how should I successfully compete (specifying a success posture); what changing circumstances might impact my performance (defining an intelligence strategy); would leading or following selling environment change be best (setting a learning and change posture); when should I adopt new selling approaches and technologies (setting a flexibility criterion in an engineering framework); should I take a long or short run planning view (administering a time budget). Consequently, this macro-adaptive strategy paradigm seems to provide a potentially rich and relevant conceptual perspective from which to more realistically and accurately examine individual salesperson performance. Three strategic typologies or configurations make sense from an external environmental “fit” and internal logic perspective. Defined along an adaptive strategy continuum, three generic strategic configurations for successful salesperson performance are posited—*prospectors*, *analyzers*, and *defenders* (Miles & Snow, 1978; Singh et al., 1996; Vorhies & Morgan, 2003). These strategic orientations, as well as our parallel interpretations to fit the entrepreneurial and independent agent sales context, are presented in Table A.

*Prospectors* are the most externally-oriented toward the larger marketing/selling environment and change. They proactively configure their entrepreneurial, engineering, and administrative frameworks or models in order to rapidly adapt to new markets, customers, or product opportunities and to marketing/selling environment changes, including economic, technological, social-legal, or competitive. Prospectors stress growth, development, and responsiveness to changing market conditions as their primary objectives. They emphasize being effective over efficiency and even build slack into their decisions for purposes of strategic flexibility in dealing with environmental uncertainty. On the low adaptability end of the adaptive continuum are *defenders*. They are internally-oriented, preferring to focus their efforts on existing market segments, customers, and business practices. Defenders stress efficiency as their primary objective; they adapt slowly and reluctantly to marketplace changes. Their strategic emphasis is on increasing efficiency in terms of their current capabilities and skills, even in the face of environmental change. *Analyzers* represent a mid-level, hybrid strategy. They attempt to balance risk and reward by only selectively copying the winning concepts, products, services, and operating approaches identified by the more externally-driven prospector companies, while maintaining their established base and efficiency with current customers, products, and operating approaches. Thus, the prospector and defender strategies represent the polar ends of an overall adaptive strategy scale with analyzers positioned in the center.

A fourth strategic configuration is that of a *reactor*. *Reactors* attempt

to opportunistically capitalize on whatever current customer, product, or selling approaches appear to be the most promising, in a sense “*carpe diem*,” i.e., without prior planning of macro- or even micro-strategy. However, most researchers ignore *reactors* (e.g., Hambrick, 1982; Matsuno & Mentzer, 2000; Vorhies & Morgan, 2003) on the basis that this archetype does not represent an adaptive success strategy because no planned and internally consistent pattern of response to environmental change is established. Given this, it is difficult to formulate research hypotheses and specify measures (Shortell & Zajac, 1990). Thus, consistent with prior empirical research (e.g., Hambrick, 1982; Matsuno & Mentzer, 2000; McDaniel & Kolari, 1987; Shortell & Zajac, 1990; Slater & Narver, 1993; Wright, Kroll, Chan, & Hamel, 1991), *reactors* are not included in the present study.

It might be suspected that longevity in sales or the salesperson career stage would most likely influence which macro-strategy might be selected by a designated salesperson. That is, relatively junior or inexperienced salespeople may be more likely to choose the prospector strategy whereas salespeople with substantial experience might be more inclined toward the analyzer or defender strategies. However, salesperson age, sales tenure, or career stage have not been shown to be reliable nor unambiguous predictors of salesperson behavior (e.g., Mehta, Anderson, & Dubinsky, 2000). Moreover, there is no consistent, widely accepted means of measuring salesperson career stage. A review of the literature reveals that various operational definitions of sales tenure and career stage have been used, including life eras (Levinson, 1986); career stages (Cron, 1984; Super & Bohn, 1970; Super, 1957); age (Dalrymple & Strahle, 1990; Hafer, 1986), and tenure (Jolson, Dubinsky, & Anderson, 1987; Stumpf & Rabinowitz, 1981). Perhaps indicative of his frustration with available research findings, one author used different measures for career stage in two separate articles appearing simultaneously in the same issue of an academic journal (Rabinowitz & Hall, 1981; Stumpf & Rabinowitz, 1981). For a review of the classic career stage literature, see, for example, Swanson (1992).

Today, job changes in sales and other professions are more dramatic and frequent than ever and age related variables have become increasingly irrelevant vis-à-vis personal motivation, health, and vitality. It would be simplistic and stereotypical to assume that salespeople fit neatly into one of the adaptive selling orientations on the basis of age, tenure, or career stage, especially in view of the lack of empirical evidence to support such a contention. Differences in individual salesperson perceptions of the macro-environment are more likely to determine which macro-selling strategy is chosen and implemented. Sales performance should, in turn, be impacted by the degree of appropriateness or suitability of the salesperson's chosen strategy for the actual market context.

Our conceptualization of salesperson macro-adaptive selling strategy differs from related perspectives such as salesperson ability and motivation to adapt (Spiro & Weitz, 1990; Weitz, 1981) and the notion of “working smarter” (Sujan, 1986). Specifically, our interest is in salesperson adaptive selling strategy as a macro-level salesperson strategic orientation rather than specific customer-level selling tactics. Albeit our conceptualization is similar to Weitz's adaptive selling construct in that we adopt an across sales calls perspective, we do not stress adapting to particular customers using influence strategies or behavioral actions.

A related approach to examining the “direction” of salesperson effort distinguishes the motivation to “work smarter” and “work harder” (Rapp et al., 2006; Sujan, 1986). More precisely, the argument is that salespeople can enhance their sales productivity by working smarter, or “choosing approaches that are effective with a particular customer or by increasing their repertoire of sales approaches” (Sujan, 1986, 41). Alternatively, they can work harder, by working more hours (persistence) or by working more actively during those hours (intensity). Several distinctions with respect to our conceptualization of salesperson macro-adaptive selling strategy should be noted. Working smarter is similar to the classic adaptive selling model (Weitz, 1981) in the sense

that it stresses the adaptiveness to a particular customer and the ability to adapt to different types of customers. This is a narrower perspective than our notion of strategic adaptive selling strategy. Second, working smarter is conceptualized as a motivational component; whereas our emphasis is on salesperson adaptive strategy in a cognitive sense, i.e., the choice of the elements of an entrepreneurial success strategy (domain selection) and the means of achieving success (domain navigation). Finally, since erstwhile research has not directly assessed the impact of working smarter and harder on sales performance, it is not clear whether these effects are independent, multiplicative, or sequential, since they are covaried in *Sujan's (1986)* model.

Our expectation is that salesperson macro-adaptive selling strategy will both directly and indirectly affect sales performance. The latter expectation involves a sequential perspective in which selling strategy also works through job involvement and work-related effort to affect sales performance. Thus, while our conceptualization of salesperson macro-adaptive selling strategy is consistent with the generic idea of “working smarter,” it is distinct in ways that may yield interesting insights concerning the modeling of both salesperson “direction” and “effort.” We develop these expected relationships below.

The sales performance model we propose is presented in *Fig. A*. For purposes of discussion, we will emphasize the “prospector” strategic type. Prospectors are the most adaptive of the strategic types. They seek to establish leadership positions by rapidly adapting to new markets, customers, products, and business methods. The prospector strategy seems most consistent with the boundary spanning sales position in general, and with the entrepreneurial salesperson or sales producer in the financial services context in particular. Salespeople in this industry tend to stress revenue generation or sales production and are not typically responsible for or responsive to the broader company-level issues such as profitability or efficiency. Defenders are at the opposite pole of the adaptive cycle (*Miles & Snow, 1978*). They tend to ignore external opportunities and pressures in general while focusing on limited innovation primarily targeting efficiency improvements with current prospects, customers, products, and selling approaches. Analyzers fall between prospectors and defenders on the adaptive cycle. From a revenue production perspective, prospector salespeople would seem to have an advantage over defenders and analyzers in rapidly changing financial markets.

Our conceptual model adds two constructs – perceived environmental uncertainty and salesperson macro-adaptive selling strategy – to sales performance models. Perceived environmental uncertainty is expected to affect the choice of a salesperson's sales strategy. Consistent with prior research (*Achrol, Reve, & Stern, 1983; Dwyer, Schurr, & Oh, 1987; Gatignon & Xuereb, 1997; Miller, 1983; Sollosy, 2013*), perceived environmental uncertainty is articulated in terms of environmental volatility, competitive hostility, and customer diversity. *Environmental volatility* (or dynamism) is defined by the amount and unpredictability of change in customer tastes, technologies, and modes of competition in the salesperson's territory or market. *Competitive hostility* is characterized by the intensity of competition in product, pricing, and distribution practices, as well as unfavorable regulatory or demographic trends. *Customer diversity* is the degree to which the salesperson's territory or market is heterogeneous in terms of customer types, their financial wherewithal, and relative demand for innovative products and services. Environmental uncertainty provides a context for selecting a strategic selling orientation that is a perceived suitable “fit” for the current sales territory. Conceptual definitions of the strategic orientation typology (*Miles & Snow, 1978*) and our adaptation of these definitions to the boundary role salesperson adaptive selling strategy are presented in *Table A*. Selection of a strategic selling orientation will be driven by salespeople's perceptions of the degree of environmental uncertainty in their sales territory.

It is expected that the perception that their sales territory is subject to uncertain and rapid changes in market conditions and business opportunities will influence salespeople to adopt the prospecting form of

adaptive selling strategy. Use of the prospector adaptive selling strategy, under this assumption, is expected to directly and positively affect sales performance, particularly in terms of revenue production. The logic is that the strategic domain selection and navigation choices and investments in time and effort of the salesperson will more suitably match the environmental exigencies, thus driving higher sales performance. For example, prospector salespeople, who allocate their efforts toward identifying new market opportunities, product innovations, and selling approaches, will be favored in terms of sales performance when markets are rapidly changing. On the other hand, when the sales territory environment is perceived to be reasonably predictable and stable, the use of a prospector strategy would involve a misallocation of selling effort in the attempt to force innovation. Under these conditions, salespeople who employ the defender strategy should be favored in terms of sales performance. Defenders would allocate their efforts toward generating more sales from current customers using selling approaches that are well understood and efficient. This should lead to higher sales performance, very likely through increased market penetration of existing segments and repeat customer business. Therefore, we hypothesize a positive relationship between perceived environmental uncertainty, the employment of the prospector adaptive selling strategy, and sales performance. On the other hand, we expect a positive relationship between perceived environmental certainty, the use of the defender strategy, and sales performance.

**H1.** Salespersons' perception of a high degree of environmental uncertainty will positively influence the use of the *prospector* macro-adaptive selling strategy; whereas, salespersons' perception of a low degree of environmental uncertainty will positively influence the use of the *defender* macro-adaptive selling strategy.

**H2.** Use of the *prospector* strategy will directly and positively affect sales performance; use of the *defender* strategy will directly and positively affect sales performance.

Salesperson macro-adaptive selling strategy may also indirectly and positively affect sales performance through job involvement and work-related effort. As boundary spanners, salespeople have the opportunity to independently select their preferred sales strategy. They are also responsible for producing results based on their decisions. Thus, in a fashion similar to the organizational climate effects noted by *Brown and Leigh (1996)*, adaptive strategy may affect sales performance through the mediating pathway of job involvement and work-related effort. The effects of freedom of choice—to select an adaptive strategy that best fits the market environment and the individual salesperson perceptions—on job involvement has been well documented (*Argyris, 1972*). It is also likely that salesperson macro-adaptive selling strategy may operate much like organizational climate, in the sense that freedom to make strategic choices in a perceived selling environment implies the ability for salespeople to satisfy psychological needs, such as self-expression, challenge, and self-management. These are the aspects of organizational climate (*Brown & Leigh, 1996*) that have been found to affect job involvement and work-related efforts (*Kahn, 1990; Pfeffer, 1994*). The direct positive effect of job involvement on work-related effort has been observed in prior studies (*Brown & Leigh, 1996; Brown & Peterson, 1994*). However, we do not expect a direct effect of salesperson macro-adaptive selling strategy on work-related effort itself. Rather, we expect an indirect effect of salesperson macro-adaptive selling strategy on work-related effort to be mediated by its effect on job involvement.

**H3.** Use of a prospector strategy will have a direct, positive effect on sales job involvement; use of a defender strategy will have a direct, positive effect on sales job involvement.

**H4.** Job involvement will have a direct, positive effect on work related effort.

Finally, consistent with previous research, we expect direct effects

of work-related efforts, but not job involvement, and job performance (Brown & Leigh, 1996; Brown & Peterson, 1994). We also expect that sales performance will positively affect job satisfaction (Brown & Peterson, 1994). Hence, we propose both direct and indirect effects of salesperson macro-adaptive selling strategy on sales performance and job satisfaction in the context of a multiple effects model as suggested by Churchill et al. (1985).

**H5.** Work-related effort will have a direct, positive effect on job performance.

**H6.** Work-related effort will have a direct, positive effect on job satisfaction.

**H7.** Sales performance will directly and positively affect job satisfaction.

It is important to note that we follow the contention (Miles & Snow, 1978) that the prospector strategy best fits the highly uncertain environment and the defender strategy fits the highly certain environment. Macro-adaptive strategies (prospector, defender, and analyzer) are defined on the basis of distinct dimensions in the domain selection and navigation. In other words, the prospector and defender strategies show qualitative distinctions such that a salesperson may score low on the prospector scale, yet not necessarily pursue a defender strategy (and vice versa). No specific research hypotheses are formulated for the analyzer strategy since it includes aspects of both the prospector and defender strategies.

### 3. Method

#### 3.1. Sample

The sample frame for this study was provided by a large Southeastern U.S. professional insurance agents association. The membership of this professional association (PIA) includes independent insurance agencies and their producers (i.e. salespeople), who sell the products of a portfolio of distinct mutual insurance firms. This sample frame is appropriate for our research purposes because of the diversity represented among the participating firms. In other words, the full range of firms described in the Miles and Snow typology is potentially reflected in the PIA sample frame. Moreover, individual producers will likely vary considerably across the sample in their personal success strategies, even within agency, because they have the opportunity to entrepreneurially determine their geographic territory, the nature of their customer mix, the mutual insurance firm they prefer to work with, and the particular products they sell to each customer. Since they are commission-based producers they also have considerable freedom to determine their personal operating and technology strategies. Thus, the PIA sample offers the opportunity to examine the entrepreneurial, administrative, and technological aspects suggested in the Miles and Snow (1978) adaptive strategy typology.

The PIA membership includes 870 owners, managers, and producers. Our desired sample was the individual revenue producers. Since we were unable to identify only the producers from the PIA membership, we sent a pre-tested questionnaire via postal mail to each PIA member. Each member was asked to identify whether they were a producer and, if so, they were asked to complete and return the questionnaire. An endorsement letter from the PIA Executive Director was included with the questionnaire. Pre-testing indicated that questionnaire length and respondent privacy were potential concerns in generating responses. Thus, it was decided not to collect individual producer demographics, and it was felt that this decision would not significantly alter the findings of our investigation. Given that our research stressed identifying the adaptive selling strategy choices of producers and their outcome effects, this compromise was felt to be reasonable. To encourage participation, a raffle was used as an incentive. Stereo speakers, computer speakers, and other electronic prizes

with a combined retail value of over \$1600 were offered. In order to be included in the raffle, producers had to return their completed questionnaires with their business cards attached. To protect respondent anonymity, however, questionnaires were identified only by a code and the salespeople were assured that their individual level responses would not be identified or shared, even among the research team. A follow-up letter was sent after two weeks to each PIA member with a cover letter reminding them to return their questionnaires if they had not already done so. After screening the returned questionnaires, a realized sample of 100 insurance producers was obtained. Related studies have realized similar sample sizes (Brown & Leigh, 1996). Hence, this number of respondents was deemed sufficient to test our hypotheses.

#### 3.2. Measures

Because our research involved examining the impact of salesperson macro-adaptive strategy in the context of a sales performance model, we employed several established scales in our empirical work. However, we developed a new measure for our key construct, the salespersons' macro-adaptive selling strategy. In developing this scale we drew on previous research concerning the Miles and Snow (1978) adaptive strategy model. The results of the development and purification of these scales are summarized in Appendix A.

##### 3.2.1. Salesperson macro-adaptive selling strategy

Our interest centers on salesperson adaptive selling strategy as a macro-level selling strategy, rather than a strategy for a specific sales call. In our model, the key conceptual issue is how salespeople strategically adapt to their perceived marketplace conditions as they pursue success in their producer sales role. In most studies based on the Miles and Snow adaptive typology, a strategic self-typing method has been employed (Conant et al., 1990; James & Hatten, 1995; McDaniel & Kolari, 1987; Shortell & Zajac, 1990; Vorhies & Morgan, 2003; Walker, 2013) in which key informants are asked to select the one paragraph that best describes their firm's strategic type (either prospector, analyzer, or defender). Although self-typing has been reported to be reliable and valid (Shortell & Zajac, 1990), we believe that a multi-item scaling approach is more suitable for examining models of sales performance because it allows: (1) a more comprehensive assessment of the domain selection (entrepreneurial) and domain navigation (engineering; administrative) properties of adaptive selling strategy; (2) a more precise empirical assessment of the reliability and validity of strategic adaptive selling strategy in the context of other predictors of sales performance.

To design a multi-item scale to measure salesperson macro-adaptive selling strategy, we first developed a set of items to reflect the entrepreneurial (ETR), engineering (ENG), and administrative (ADM) components of the strategic adaptive cycle (Miles & Snow, 1978; Conant et al., 1990). Although the entrepreneurial component may be most directly relevant to the producer role and recent studies have in fact measured only the entrepreneurial dimension (Vorhies & Morgan, 2003), we felt that it was important to sample the full range of strategic choices implied by the domain selection and navigation aspects of adaptive selling strategy. With the counsel of several PIA producers, we developed an initial pool of forty items distributed across the strategic types as follows: (1) Prospector [7 entrepreneurial, 3 engineering, 4 administrative]; (2) Defender [6 entrepreneurial, 4 engineering, 4 administrative]; and (3) Analyzer [4 entrepreneurial, 4 engineering, 4 administrative]. Each item was specified as a Likert-type scale (with 7 points ranging from "strongly agree" to "strongly disagree"). The scales were investigated using a two-step procedure. First, items with an item-total correlation of < 0.40 were dropped from each scale. Coefficient alpha then was assessed on each of these reduced scales. The six-item prospector scale shows a coefficient alpha of 0.85. This scale strongly reflects many of the expected prospector characteristics, such as: being the first to identify market and new product opportunities (ETR);

leading the market in innovation and innovative new products (ETR); constantly learning about new products, technology, and new ways to sell (ENG); experimenting on a regular basis to find new ways to sell and operate (ADM); and continually innovating to stay ahead of other producers and the competition (ETR). The six-item defender scale's coefficient alpha was 0.64. This scale strongly reflects expected defender characteristics, such as: narrow selectivity in customer base (ETR); focus on a narrow set of products (ETR); focusing personal learning on enhancing current capabilities and efficiency improvements (ENG); and, protecting current position by narrow emphasis on “the things I already do better than anyone else (ENG).” The five-item analyzer scale shows reliability of 0.74. This scale reflects analyzer characteristics, such as: the need to be careful and deliberate in adopting new ideas, products, and practices (ETR); watching more venturesome producers, then copying their ideas (ETR); waiting until new products are proven (ETR); letting others do the experimenting first, then copying their ideas quickly (ENG); and protecting my position by only carefully modifying things I already do well (ENG). Each of these items seems consistent with the notion that the analyzer is trying to balance innovation, risk, and efficiency (i.e., neither a prospector nor defender). Second, having identified acceptable reliability properties for each macro-level adaptive selling strategy, a series of confirmatory factor analyses (CFA) were conducted to further evaluate the psychometric properties (i.e., dimensionality) of each construct since these scales were newly developed in the study. Each of the unidimensional CFA models fit the data well. Chi-square values are all significant ( $p < .05$ ), and all lambdas are large and significant ( $p < .05$ ). Furthermore, the additional model fit indices (i.e., Goodness of Fit Index, Comparative Fit Index) show acceptable ranges throughout the three latent constructs (i.e.,  $> 0.90$ ). Thus, we believe that our scales for measuring salespersons' strategic selling adaptiveness are reliable and unidimensional, and thus, appropriately measure the designated constructs. Higher scores on these scales show high tendency of each strategy.

### 3.2.2. Perceived environmental uncertainty

Three environmental constructs relevant to perceived environmental uncertainty—environmental volatility, competitive hostility, and customer diversity—that might influence the choice of a salesperson's macro-adaptive selling strategy were also examined. These scales were based on previous research (Achrol et al., 1983; Gatignon & Xuereb, 1997). The 7-point Likert scales used to measure these uncertainty dimensions are presented in Appendix A. Coefficient alphas for these scales are: volatility, 0.67; hostility, 0.71; and, customer diversity, 0.83. Higher scores indicate greater perceived environmental uncertainty.

### 3.2.3. Job involvement

Job involvement is defined as a cognitive belief state of psychological identification with one's job (Brown & Leigh, 1996; Lawler & Hall, 1970; Rabinowitz & Hall, 1977). A frequently used six-item version of the Lodahl and Kejnar (1965) scale was used to measure job involvement (see Appendix A). Responses were collected using a 5-point Likert scale (strongly agree to strongly disagree). Coefficient alpha was 0.78 which compares favorably to prior research in sales (Brown & Leigh, 1996). Salespeople with higher scores on the scale are likely to show stronger job involvement than their counterparts.

### 3.2.4. Work-related effort

For purposes of this study, effort is defined in terms of work intensity (energy expended per unit of time), rather than the composite of intensity and time commitment (persistent at working hard over time) used in some previous research (Brown & Leigh, 1996; Naylor, Pritchard, & Ilgen, 2013). Our interest was in effort in its purest sense of working intensely on implementing a selling strategy, rather than the total number of hours spent. Intensity and time commitment were

found to have modest correlation in one study (Brown & Leigh, 1996). The three Likert-type (7 = strongly agree to 1 = strongly disagree) items measuring work intensity are presented in Appendix A. Coefficient alpha for work intensity was 0.73. Those with higher scores on this scale are likely to expend more effort than those with lower scores.

### 3.2.5. Sales performance

Sales performance is defined in terms of the multidimensional construct originally suggested for boundary spanning sales jobs by Behrman and Perreault (1982, 1984), who indicate that sales performance, in a perceptual sense, involves: (1) achieving sales objectives; (2) developing and using technical knowledge; and (3) administrative performance. These dimensions of sales performance were measured by 7-point self-report ratings anchored by “needs improvement” and “outstanding” (see Appendix A). Coefficient alphas for each of the scales were, as follows: sales performance, 0.87; knowledge, 0.85; administration, 0.73. Higher scores on each scale represent better sales performance.

### 3.2.6. Job satisfaction

Job satisfaction is defined in terms of how a salesperson feels about the job, its role requirements, outcomes, and organizational feedback (e.g., Brown & Peterson, 1994; Singh et al., 1996; Walker et al., 1977). Job satisfaction is generally conceptualized as a multidimensional construct consisting of intrinsic and extrinsic satisfaction. Intrinsic satisfaction is related to the internally mediated rewards obtained from the job—particularly the work itself, growth opportunities, and sense of accomplishment. Extrinsic satisfaction is related to the externally mediated rewards bestowed by the firm, such as pay, managerial support, promotions, and peers. To measure intrinsic and extrinsic satisfaction, we used seven-item and six-item Likert-type scales (strongly agree to strongly disagree), as shown in Appendix A. Cronbach's alphas for these scales were: intrinsic job satisfaction, 0.91; extrinsic job satisfaction, 0.82. Higher scores on each scale indicate greater job satisfaction.

## 3.3. Overview of the measurement models in SEM

A series of structural equation models (SEM) were conducted to investigate our hypotheses. For ease of SEM implementation, we follow Bagozzi and Heatherton's (1994) partial disaggregation approach in constructing measurement models (see the graphical presentation of the models in Figs. B and C). First, two new indicators are created by randomly summing designated original measurement indicators when a construct is unidimensional. As a result, this method is used in the three endogenous variables in our models: salesperson adaptive selling strategy (i.e., prospector, defender), job involvement, and work-related involvement. Specifically, two sets of three indicators are randomly chosen and aggregated to create two new indicators in measuring salesperson strategic selling adaptiveness and job involvement. Since there are originally three indicators of work-related effort, two indicators are randomly selected and summated to form a new indicator whereas the remaining indicator is maintained for a second indicator. Second, sub-dimensions are aggregated to generate a new indicator when a construct is multidimensional. This method is adopted for one exogenous variable (i.e., perceived environmental uncertainty) and two endogenous constructs (i.e., sales performance, job satisfaction). More precisely, there are three indicators to measure salespersons' perceived environmental uncertainty. These three indicators are the sum of designated three sub-dimensions (i.e., volatility, hostility, customer diversity). In the same way, salespersons' job performance has three indicators derived from its three sub-constructs (i.e., sales performance, knowledge, administration). Additionally, two sub-constructs (i.e., intrinsic vs. extrinsic) of the job satisfaction variable create two indicators to measure the latent sales job satisfaction construct. Finally, in order to rule out possible common method variance issues due to our single data

source, we conducted one of the most widely used techniques, Harman's single factor test. This one factor solution explained only 24.9% of the total variance, which is substantially smaller than the conventional threshold of 50%. Thus, we believe that common method variance is not a potential problem in our research.

### 3.4. Analysis and results

Descriptive statistics for the manifest variables are presented in Table B. In order to test our hypotheses, we applied a two-step model specification using SEM. First, we created a model without any mediation variables (i.e., job involvement, work-related effort). This model mainly attempts to identify an antecedent and consequences of salesperson macro-adaptive selling strategy on job performance and job satisfaction. Second, we generated the two mediating variables within the first model. This allows the testing of the possibility of the mediation. The correlation matrix is used to perform the model test. Finally, since we are interested in examining the effects of the salespersons' prospecting and defending strategy independently, we assessed the model using a latent variable of "prospector" as an adaptive strategic approach—hereafter "prospector model." We independently examined the latent variable of "defender" as the bipolar salesperson adaptive selling strategy—hereafter "defender model." Otherwise the models estimated are the same. Overall findings are shown in Figs. B and C. In each case, the bold type results are for the prospector model; the regular type figures on the bottom are for the defender model. No significant effects were found for the analyzer strategy, so it is not included in the tables or figures.

#### 3.4.1. Antecedent and consequences of macro-adaptive strategies

As shown in Fig. B, testing of the prospector and defender models yield antecedents and consequences of two types of sales strategic approaches that fit the data well: prospector model [ $\chi^2 = 33.4$  (31),  $p > .05$ , GFI = 0.937, CFI = 0.988] and defender model [ $\chi^2 = 45.4$  (33),  $p > .05$ , GFI = 0.916, CFI = 0.943]. All lambdas are large and significant ( $p > .05$ ). For the prospector model, the results support H1 in that the salespersons' perception of a high degree of environmental uncertainty positively affects the adoption and use of the prospector strategy ( $\gamma = 0.43$ ,  $p < .05$ ). Moreover, supporting H2, the use of the prospector strategy directly and positively affects sales performance ( $\beta = 0.35$ ,  $p < .05$ ), but not job satisfaction. However, consistent with prior research sales performance directly and positively affects job satisfaction ( $\beta = 0.40$ ,  $p < .05$ ). Hence, in the financial services context examined here, it appears that our hypotheses hold in that macro-adaptive selling strategy, as reflected in the use of the prospector model, significantly and positively affects sales performance directly and job satisfaction indirectly through the mediation of job performance. However, no significant relationship between perceived environmental certainty and the use of the defender strategy was found. Moreover, the use of the defender strategy shows no significant direct or indirect effects on either job performance or job satisfaction (although sales performance and job satisfaction are positively related).

#### 3.4.2. The hypothesized mediation model

We proposed that the relationship between salesperson's macro-adaptive selling strategy and sales performance would also be mediated by the degree of job involvement and work-related effort. The results of this mediation model are shown in Fig. C. As expected in H3 and H4, the mediating effects of the job involvement and effort intensity pathway are significant and positive in the prospector model. However, job involvement and effort intensity do not appear to play an important mediation role in the defender model. Specifically, for the prospector model, we found that the significant, direct relationship between the use of the prospector strategy and sales performance was only moderately attenuated ( $\beta = 0.30$ ,  $p < .05$ ) when job involvement and work-related effort are added to the model. However, consistent with H3–H5,

we do find an indirect relationship between the use of the prospector strategy and sales performance via the pathway of job involvement and work-related effort ( $\beta_{\text{Prospector Strategy} \rightarrow \text{Job Involvement}} = 0.30$ ,  $p < .05$ ;  $\beta_{\text{Job Involvement} \rightarrow \text{Work-related Effort}} = 0.36$ ,  $p < .05$ ;  $\beta_{\text{Work-related Effort} \rightarrow \text{Job Performance}} = 0.26$ ,  $p < .05$ ). As expected in H7, sales performance, in turn, positively affects job satisfaction ( $\beta = 0.33$ ,  $p < .05$ ). However, we do not find the expected indirect relationship between the use of a prospector strategy and job satisfaction through the mediation of job involvement and effort intensity. The expected positive effect of effort intensity on job satisfaction posited in H6 is not found. Hence, the use of a prospector strategy in our financial services context seemingly impacts sales performance directly, as well as indirectly through the mediation of the pathway from job involvement  $\rightarrow$  effort intensity  $\rightarrow$  sales performance. However, no significant effect of the defender strategy was found.

## 4. Discussion

Our research objective was to examine the strategic aspects of how salespeople adapt to the perceived market, customer, and product opportunities as well as the challenges in their sales territories. We developed the concept of salesperson macro-adaptive selling strategy by adapting the strategic orientation model specified at the organizational level (Miles & Snow, 1978) to the sales context. Our goal was to examine salesperson macro-strategic adaptability as a personal success stratagem in domain selection and domain navigation across customers and products, rather than adaptiveness only to the exigencies of a particular sales call. To that end, we developed measures to reflect the *prospector*, *analyzer*, and *defender* salesperson macro-adaptive selling strategies and empirically investigated their effects on sales performance, job involvement, work-related effort intensity, and job satisfaction.

Our results are encouraging, although mixed. We found that the prospector form of salesperson macro-adaptive selling strategy directly and positively impacts sales performance. We also found that the prospector strategy indirectly and positively affects sales performance through the mediation of job involvement and work-related effort intensity. Job involvement also mediates the effect of the prospector strategy on job satisfaction. However, we found no significant relationship for either the defender or analyzer macro-adaptive selling strategies. This latter result is somewhat puzzling in light of the expectation from the strategy literature that each of these adaptive strategies should drive performance. Perhaps, insurance sales is such a uniquely entrepreneurial revenue or producer driven type of personal selling that it offers greatest opportunities for the prospector strategy which translates most directly and positively into sales performance, job involvement, and job satisfaction. In other industries, for example, where long-term customer relationships are more desired and rewarded using sophisticated performance criteria beyond simple sales revenue, the defender and analyzer macro-adaptive selling strategies may be more appropriate and relate more directly to personal selling success and sales job satisfaction. Similarly, the Miles and Snow strategies might provide insights into salesperson territory management that transcends working harder and smarter. The strength of the prospector results may be due to the particular relevance of this adaptive strategy to selling environments in general, or to the particular financial services context examined during a time period of considerable instability and anxiety. As previously noted, sales contexts may reward domain selection more than domain navigation in the sense that entrepreneurial aspects of adaptive strategy may be particularly favored. Our results indicate the strong impact of perceived environmental uncertainty on the use of the prospector strategy and sales performance.

While defender and analyzer strategies may be less relevant in a dynamic selling environment such as the financial services industry, it is too early in our research to discount the possible performance impacts of these more conservative macro-adaptive selling strategies.

Whereas, the prospector selling strategy may best fit highly uncertain market conditions, the defender/analyzer strategies may be effective when marketing or selling environment change is low, or when salesperson performance measures are more sophisticated. The perspective of the Miles and Snow (1978) model is that prospectors, defenders, and analyzers can each successfully compete in a given marketplace (using ROI as a success criterion). In our case, the prospector salesperson may pursue success by aggressively identifying new market, customer, and product opportunities. Therefore, sales revenue production (especially revenue from new customers or products) would be the most relevant criterion for evaluating the prospector's performance. Defenders, on the other hand, would seemingly pursue success by emphasizing customer retention, cross-selling, referral sales, and long-term relationships. Various studies have contended that higher customer retention or loyalty provide greater profits over the long-run (e.g., Helgesen, 2006; Kumar & Rajan, 2009; Kumar & Reinartz, 2016; Reichheld, Markey, & Hopton, 2000; Reinartz & Kumar, 2002; Watson, Beck, Henderson, & Palmatier, 2015). Thus, a more sophisticated set of sales and operations measures may be required to tease out the relative performance of the defender strategy. Analyzers are even more complex in that their strategies mix the prospector and analyzer strategies. Overall, while our financial sales context results show significant effects only for the prospector macro-adaptive selling strategy, the defender and analyzer strategies may show stronger results in different selling contexts and with different sales performance measures. This is consistent with the general notion, especially among business practitioners, that salespeople may employ different pathways to success.

Our results indicate that a more macro-level conceptualization of salesperson adaptive strategy may be quite useful in explaining sales performance and job satisfaction. However, our adaptation of the Miles and Snow (1978) model to the sales context is only one of many conceptual perspectives. In fact, the expectation of the Miles and Snow model that strategic archetypes present coherent, integrative strategies may be too rigorous and limiting. For example, strategy researchers examine entrepreneurship orientation more generally in terms of three characteristics: innovativeness, risk-tasking, and proactiveness (Covin & Slevin, 1988; Miller, 1983). The marketing literature posits market orientation as an adaptive learning capability (Slater & Narver, 1995) involving collecting, disseminating, and responding to market intelligence (Kohli & Jaworski, 1990). Interestingly, Atuahene-Gima and Ko (2001) argues that a balance between entrepreneurship and market orientation is “a primary factor in an organization's performance, survival, and prosperity.” Similarly, Hurley and Hult (1998) propose innovativeness as a cultural orientation interacting with market orientation to effectuate adaptive capacity. Finally, Moorman and Miner (1998) propose improvisation as a specific type of innovative behavior that involves fast learning and the convergence of planning and execution to enable rapid response to changing market conditions. No doubt there are a variety of other conceptual approaches relevant to the notion of adaptive potential of both organizations and sales personnel. Our point is that salesperson adaptive selling strategy might be more generally conceptualized in terms such as entrepreneurship orientation, market orientation, learning orientation, innovativeness orientation, or improvisational capacity. Conceptual and empirical research on the impact of these aspects of strategic adaptive capacity on sales performance, and the limiting conditions under which each operates, is indicated. Sales performance research is likely to require multiple predictors and should include characteristics of the selling environment (Churchill et al., 1985). Our study examined the effect of environmental uncertainty on the selection of a macro-adaptive selling strategy by salespeople. Other aspects of the product, the customer, and the organization itself ought to be examined as well to assess the appropriateness and effectiveness of salesperson macro-adaptive selling strategy.

Personal characteristics of the salesperson, or the sales unit, might be jointly examined in sales performance research. In a sense, we partially did this by examining macro-adaptive selling strategy in the

context of job involvement and work-related effort intensity. However, as indicated by meta-analyses of the sales performance literature (Churchill et al., 1985; Vinchur, Schippmann, Switzer III, & Roth, 1998), a key issue in adding an explanatory variable to the sales performance literature is that it must be expected to show incremental validity in the context of multiple predictors. Hence, salesperson macro-adaptive selling strategy should be expected to add validity in the context of other significant predictors, or possibly show nomological linkages with them. For example, Vinchur et al. (1998) conclude that the most significant predictors of sales performance are the “Big 5” dimensions of extraversion and conscientiousness, potency and achievement sub dimensions, cognitive ability, sales ability, and interest. Therefore, an interesting question for future research is “does salesperson macro-adaptive selling strategy add incremental validity over these more general personality and cognitive predictors?” Alternatively, it may be that potency and achievement, cognitive ability, or even some recently introduced predictors such as learning goal orientation (VandeWalle, Brown, Cron, & Slocum, 1999) will either predict, or moderate, the effects of adaptive selling strategy on sales performance. In any event, our sense is that attention to the strategic aspects of how the salesperson adapts to personally perceived market opportunities, in the sense of “working smarter,” will add incremental validity to sales performance models.

Role stress has the longest tradition in sales performance research and has been demonstrated, although modestly, to have the strongest impact of any predictor on sales performance (Churchill et al., 1985; Singh et al., 1996). It might be expected that role perceptions would also influence the model we present. However, conceptual support for a linkage between salesperson macro-adaptive selling strategy and either role ambiguity or role conflict is lacking. The primary factors driving role perceptions in sales models are organizational and managerial practices. Walker et al. (1977) indicate that the degree of “innovativeness” required in the sales job will positively impact both role ambiguity and role conflict. Given its emphasis on innovativeness, we might expect that the prospector form of adaptive selling strategy will directly and positively affect role ambiguity and role conflict. The less innovative analyzer and defender strategies would apparently show more modest, or perhaps negative, effects on role perceptions, work-related effort, and job-related outcomes (Brown & Peterson, 1994). However, since Behrman and Perreault (1984) report a positive effect for role conflict on sales performance, these effects may depend on the sales context examined.

## 5. Managerial implications, limitations and future research

From our research findings indicating the importance of macro-adaptive salesperson strategies to performance and satisfaction, sales managers for companies that deploy agency salespeople to reach their evolving markets should provide training, podcasts, brochures, booklets, online videos, or other online and off-line materials to help their salespeople stay alert to changing marketing/selling environments and how best to adjust to them. In other words, sales managers can become their salespeople's early warning systems about dynamic markets. Moreover, given the rapid technological advances and evolving preferences of prospects and customers for products and services in contemporary markets, sales managers might consider efforts to convert defender salespeople into being more like producer salespeople. As most all companies and salespeople understand, change is constant and there is no escaping the need to rapidly adjust and adapt new strategies in the face of intensifying competition in order to thrive or even survive in today's markets. Sales Managers will need to become more knowledgeable and concerned about their salespeople's macro-adaptive strategies in response to the marketing/selling environment. Focusing only on micro-adaptive selling strategies for targeted prospects and customers is not sufficient for success in the dynamic markets of contemporary selling. Creating a continuously learning, flexible, and



rapidly adapting sales force to evolving market forces will likely differentiate successful sales managers as escalating competition comes from global online competitors in addition to those in a given sales territory. Salespeople who are able to perceive marketing/selling environment changes ahead of their competitors should perform well and be more satisfied with their sales jobs.

Some caveats concerning this research should be noted. Our measures of the prospector, defender, and analyzer forms of macro-adaptive selling strategy may not adequately reflect the full range of entrepreneurial, engineering, and administrative components of the adaptive cycle. But the emergent scales do reflect the theoretical content of the adaptive cycle. Moreover, the prospector strategy shows excellent reliability. Whereas, the defender and analyzer scales indicate only modest reliability. Similarly, the job involvement and work-related effort intensity scales show modest reliability. These lower reliabilities work against confirmation of the expected model relationships. This may have disadvantaged the defender and analyzer results in particular.

Second, this study is limited to the financial services context, in particular examining “producers” in the insurance industry who have revenue production targets. Research in a variety of sales contexts is

indicated, with explicit inclusion of measures of possible moderating conditions due to the sales context (e.g., sales autonomy, selling cycle length, product type, customer characteristics, length of the customer relationship, sales task complexity, and sales goals).

In conclusion, this study has introduced the concept of macro-adaptive selling strategy across customers for salespeople and has demonstrated partial empirical support for its role in directly driving sales performance in the financial services sales context. It appears that some salespeople—especially those who are largely independent or paid mainly by commissions—do adopt a macro-adaptive personal selling strategy across customers when they perceive a change in their marketing/selling environments. This finding may help sales managers in training, motivating, rewarding, controlling, and evaluating these salespeople. And, it should provide more understanding about how salespeople – empowered via telecommunications technology and increasingly functioning like “marketing managers in the field” – adjust their overall selling strategies with perceived environmental changes to enhance their performance and earnings. This macro-strategic approach to adaptive personal selling offers promise in more fully understanding and explaining salesperson performance and in guiding sales management practice.

Table A  
Application of Miles and Snow (1978) strategic type to salesperson adaptive type.

| Miles and Snow (1978) strategic typology   | Boundary role salesperson adaptive strategy typology   |
|--|--|
| <p><i>Prospectors</i><br/>Organizations which almost continually search for market opportunities, and they regularly experiment with potential responses to emerging environmental trends. Thus, these organizations often are the creators of change and uncertainty to which their competitors must respond. However, because of their strong concern for product and market innovation, these organizations usually are not completely efficient. (Miles &amp; Snow, 1978, p. 29)</p> | <p><i>Prospectors</i><br/>I attempt to stay on the “cutting edge” of the market, always being among the first to move into new products and markets. I sell the latest products and look for new products and new customer markets, or those that haven't been adequately served. I protect my competitive position by quickly learning about new products, market trends, and new ways of doing business. I am most concerned with effectiveness, or “finding the right things to do,” preferably before everyone else finds them. I often experiment with new ways of selling and running my business. I stress effectiveness over efficiency, and I am willing to accept the fact that not everything I try will be successful. I evaluate my performance relative to other producers particularly innovative producers.</p>                        |
| <p><i>Analyzers</i><br/>Organizations which operate in two types of product-market domains, one relatively stable, the other changing. In their stable areas, these organizations operate routinely and efficiently through formalized structures and processes. In their more turbulent areas, top managers watch their competitors closely for new ideas, and then they rapidly adopt those which appear to be the most promising. (Miles &amp; Snow, 1978, p. 29)</p>                 | <p><i>Analyzers</i><br/>I attempt to maintain a strong position in the more traditional markets, while also selectively and carefully following successful new developments in the industry. I sell the basic products, while selectively adding new products with demonstrated appeal. I carefully monitor the actions of other producers so I can frequently be “second in.” Thus, I avoid investing in too many new ideas that turn out to be failures. I try hard to balance efficiency and effectiveness in everything I do. I occasionally experiment with new ways of selling and running my business. However, I am careful to analyze the consequences for my current position before adopting new practices. I evaluate my performance against both my own past performance as well as the performance of other producers similar to me.</p> |
| <p><i>Defenders</i><br/>Organizations which have narrow product-market domains... As a result of this narrow focus, these organizations seldom need to make major adjustments in their technology, structure, or methods of operation. Instead, they devote primary attention to improving the efficiency of their existing operations (Miles &amp; Snow, 1978, p. 29)</p>   | <p><i>Defenders</i><br/>I attempt to locate and maintain a secure niche in a relatively stable product or customer market. I sell a more limited range of products that other producers do. I protect my position by offering superior service, better product recommendations, and quality relationships with clients. I am most concerned with “doing the things I'm already doing better,” rather than trying to invent new ways of doing things. I rarely experiment with new ways of selling and running my business. I stress efficiency in everything I do. I primarily evaluate my performance by evaluating whether or not my own current performance exceeds that of the past.</p>   |

Table B  
Correlations between major constructs.

|      | Perceived environmental uncertainty (PEU) | Adaptive strategic approach: prospector (PRO) | Adaptive strategic approach: defender (DEF) | Job involvement (JI) | Work-related effort (WRE) | Sales performance (SP) | Job satisfaction (JS) |
|------|---|---|---|----------------------|---------------------------|------------------------|-----------------------|
| PEU  | 1.00                                      |   |   |                      |                           |                        |                       |
| PRO  | 0.28                                      | 1.00  |   |                      |                           |                        |                       |
| DEF  | 0.03                                      | -0.04   | 1.00  |                      |                           |                        |                       |
| JI   | 0.06                                      | 0.19  | 0.04  | 1.00                 |                           |                        |                       |
| WRE  | 0.01                                      | 0.20  | 0.06  | 0.15                 | 1.00                      |                        |                       |
| SP   | -0.03                                     | 0.34  | 0.08  | -0.07                | 0.38                      | 1.00                   |                       |
| JS   | 0.09                                      | 0.18  | -0.07                                       | 0.19                 | 0.22                      | 0.36                   | 1.00                  |
| Mean | 4.84                                      | 4.40  | 4.23  | 2.56                 | 4.52                      | 5.03                   | 5.45                  |
| SD   | 0.82                                      | 1.02  | 0.84  | 0.71                 | 1.13                      | 0.74                   | 0.82                  |

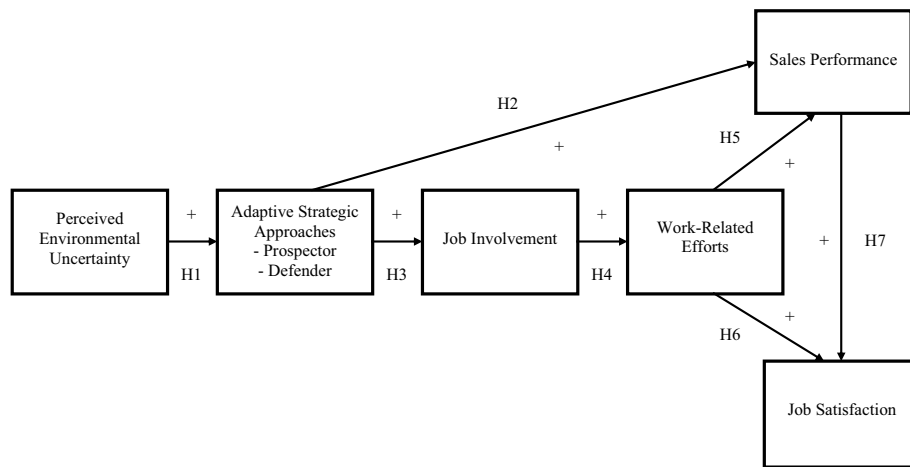


Fig. A. Conceptual model for sales performance.

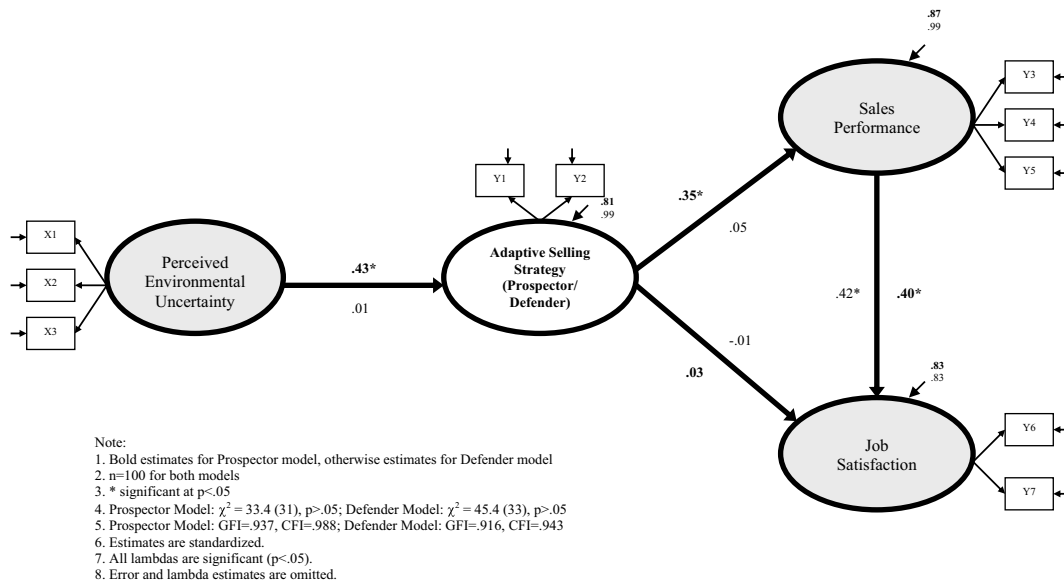


Fig. B. Antecedent and consequences of adaptive strategic approaches: the prospector defender adaptive selling strategy.

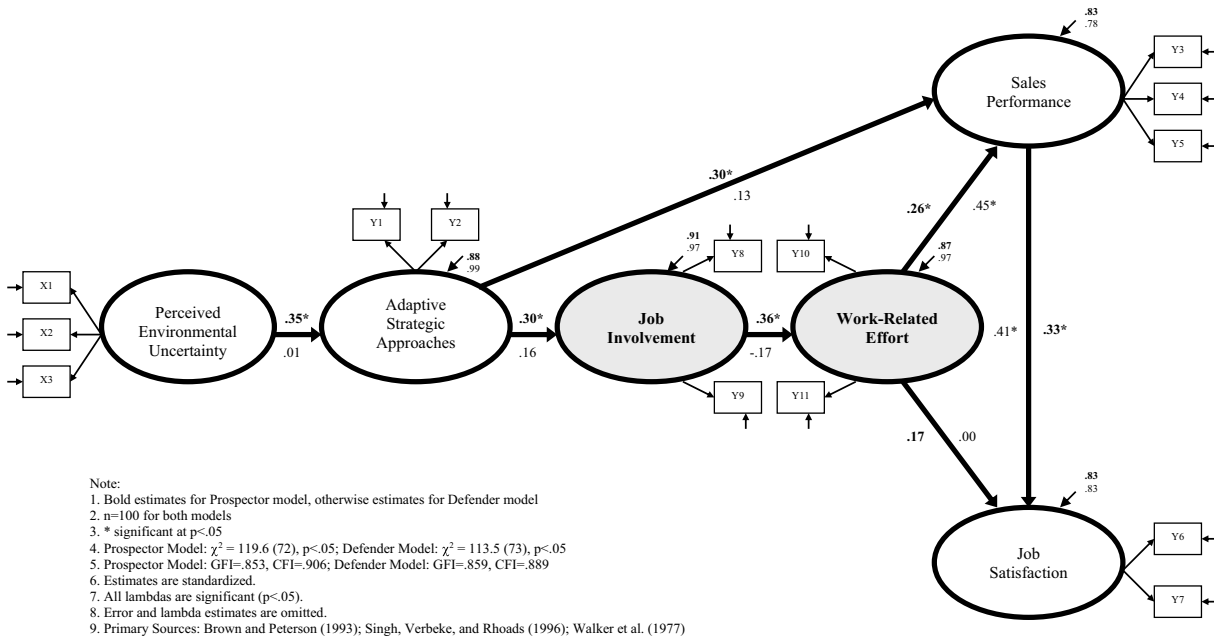


Fig. C. Hypothesized mediation model: prospector vs. defender.

Appendix A. Salesperson adaptive selling strategy types (new scales)

| Construct   | Item   | Mean | SD   | $\alpha$ | CFA    |   |
|---|--|------|------|----------|--------|---|
|   |  |      |      |          | Lambda | Model fit   |
| Prospector  | -I am constantly learning about new products, new technology, and new ways of selling (ENG)                          | 5.45 | 1.36 | 0.85     | 0.56   | $\chi^2 = 14.4$ (9)<br>p = .110<br>GFI = 0.954<br>CFI = 0.972 |
|   | -I actively try to spot changes in the marketplace before anyone else is aware of them (ETR)                         | 4.65 | 1.33 |          | 0.61   |   |
|   | -I want to be perceived as the producer who leads the market in successful new product innovations (ETR)             | 4.23 | 1.47 |          | 0.83   |   |
|   | -I primarily increase my sales by being the first to enter new markets and sell new products (ETR)                   | 3.59 | 1.42 |          | 0.75   |   |
|   | -On a day-to-day basis, I stress experimentation and finding new ways of selling and operating (ADM)                 | 4.01 | 1.17 |          | 0.61   |   |
|   | -I protect my position by constantly innovating to stay ahead of competitors and other producers (ETR)               | 4.50 | 1.33 |          | 0.81   |   |
| Defender  | -I limit my prospecting to customers who are similar to my existing book of business (ETR)                           | 3.55 | 1.47 | 0.64     | 0.60   | $\chi^2 = 6.0$ (9)<br>p = .737<br>GFI = 0.980<br>CFI = 1.000  |
|   | -I am very selective about the types of customers to whom I sell (ETR)   | 4.52 | 1.51 |          | 0.38   |   |
|   | -I limit my selling effort to a very narrow set of products (ETR)  | 3.15 | 1.60 |          | 0.54   |   |
|   | -I focus most of my learning on becoming more efficient at what I already do well (ENG)                              | 4.82 | 1.27 |          | 0.44   |   |
|   | -I already know my job, I simply try to become more efficient every day (ENG)  | 4.91 | 1.27 |          | 0.34   |   |
| -I protect my position by focusing on a limited number of things I already do better than anyone else (ENG) | 4.43   | 1.21 |      | 0.55     |        |   |
| Analyzer  | -I am careful to let more venturesome producers try new ideas, then copy the ones that best fit my strategy (ETR)    | 3.22 | 1.30 | 0.74     | 0.43   | $\chi^2 = 11.0$ (5)<br>p = .051<br>GFI = 0.957<br>CFI = 0.943 |
|   | -I very purposely wait to sell new products until they have been proven in the marketplace (ETR)                     | 3.59 | 1.56 |          | 0.78   |   |
|   | -I want to be perceived as a very careful producer who waits to sell new products until they have been proven (ETR)  | 3.87 | 1.64 |          | 0.83   |   |
|   | -I tend to let others do the experimenting first, then I quickly copy their successes and avoid their failures (ENG) | 3.27 | 1.30 |          | 0.42   |   |
|   | -I protect my position by only carefully modifying things I already do well (ENG)                                    | 4.25 | 1.31 |          | 0.50   |   |

Note:  
 1. ETR = entrepreneurial; ENG = engineering; ADM = administrative component.  
 2. All lambdas are standardized and significant at p < .05.

3. CFA = confirmatory factor analysis; GFI = goodness of fit index; CFI = comparative fit index.

#### A.1. Perceived environmental uncertainty

My market or sales territory:

- Volatility ( $\alpha = 0.67$ )

1. Requires constant juggling among insurance providers to stay competitive.
2. Is extremely volatile in terms of its demand for financial products.
3. Requires constant juggling to stay ahead of the competition.

- Competitive hostility ( $\alpha = 0.71$ )

1. Can be quite frustrating because my competitors are unpredictable.
2. Is very saturated in terms of its demand for traditional products and services.
3. Suffers from very intense competition.

- Customer diversity (heterogeneity) ( $\alpha = 0.83$ )

1. Is very diverse in the financial wherewithal of its resident population.
2. Includes people from “all walks of life”.
3. Is very diverse in terms of its customer types and their needs.
4. Offers exceptional opportunity for new innovative products.

#### A.2. Job involvement ( $\alpha = 0.74$ )

1. The major satisfaction in my life comes from my job.
2. The most important things that happen to me involve any work.
3. I have other duties that are more important than my work (-).
4. I live, eat, and breathe my job.
5. To me, my work is only a small part of who I am (-).
6. Most things in life are more important than work (-).

#### A.3. Work-related effort ( $\alpha = 0.73$ )

1. I work harder on a day-to-day basis other than most salespeople.
2. I work with much greater intensity than my peers in all aspects of my job.
3. I complete the sales tasks in front of me in less time than my peers.

#### A.4. Job performance

- Sales performance ( $\alpha = 0.87$ )

1. Produces a high market share for the company in his/her territory.
2. Emphasizes sales of those products with the highest profit margins.
3. Quickly generates sales of new company products.
4. Generates a high level of dollar sales.
5. Identifies and sells to major accounts in his/her territory.
6. Produces sales or blanket contracts with long-term profitability.
7. Uses established contacts to develop new customers.

- Sales knowledge ( $\alpha = 0.85$ )

1. Recommends on his/her own initiative how company operations and procedures can be improved.
2. Works out effective solutions to customers' questions or objections.
3. Communicates his/her sales presentation clearly and concisely.
4. Knows the applications and functions of company products.
5. Acts as a special resource to other departments that need his/her assistance.
6. Convinces customers that he/she understands their unique problems and concerns.
7. Is able to detect causes of operating failure of company products.
8. Keeps abreast of his/her company's production and technological developments.

- Administrative controls ( $\alpha = 0.73$ )

1. Provides accurate and complete paperwork related to orders, expenses, and other routine reports.

2. Carries out company policies, procedures, and programs for providing information.
3. Makes effective use of audiovisual aids (charts, tables, and the like) to improve his/her sales presentation.
4. Submits required reports on time.
5. Maintains company specified records that are accurate, complete and up to date.

#### A.5. Job satisfaction

- Intrinsic job satisfaction ( $\alpha = 0.91$ )

1. The authority connected with my selling position.
2. The opportunity for independent thought and action in my selling position.
3. The opportunity in my selling position for participation in the setting of goals.
4. The opportunity in my selling position for participation in the determination of methods and procedures.
5. The opportunity for personal growth and development in my selling position.
6. The feeling of self-fulfillment a person gets from being in my selling position (that is, the feeling of being able to use one's own unique capabilities, realize one's own potentialities).
7. The feeling of worthwhile accomplishment in my selling position.

- Extrinsic job satisfaction ( $\alpha = 0.82$ )

1. The feeling of security in my selling position.
2. The opportunity in my selling position to give help to others.
3. The opportunity to develop close friendships in my selling position.
4. The feeling of self-esteem a person gets from being in my selling position.
5. The prestige of my position inside the company (that is, the regard received from others in the company).
6. The prestige of my position outside the company (that is, the regard received from others in the company).

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