**Using Clicks to Drive Influence Tactics Picks:**
**Optimizing Offline Adaptive Selling through Online Click-through Data**

Essi Pöyry
Ph.D. Candidate
Aalto University School of Business, Marketing Department
Lapuankatu 2, 2nd floor, FIN-00076 Helsinki, Finland
e-mail: essi.poyry@aalto.fi
phone: +358 40 353 8448

Petri Parvinen, Ph.D.
Professor of Sales Management
Aalto University School of Business, Marketing Department
Lapuankatu 2, 2nd floor, FIN-00076 Helsinki, Finland
e-mail: petri.parvinen@aalto.fi
phone: +358 50 312 0905

Richard G. McFarland, Ph.D.*
Associate Professor
College of Business and Economics, Department of Marketing
West Virginia University
P.O. Box 6025
Morgantown, WV 26506-6025
e-mail: rgmcfarland@mail.wsu.edu
phone: (304) 293-7306
fax: (304) 293-3274

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* Corresponding author

Adaptive selling is defined as "the practice of altering sales behaviors during customer interactions based on perceived information about the nature of the selling situation" (Weitz et al. 1986, p. 175). A central tenant of adaptive selling is that salespeople acquire, analyze, and use customer information in sales situations and the more accurate is the information, the more effective are their adaptive selling behaviors (Hunter and Perreault 2006). Traditionally, customer information acquisition has been based on personal observations by salespeople but the use of customer database systems and data acquired through online, interactive sales channels provide promising new avenues for providing customer data to drive adaptive selling (Ahearne et al. 2008).

A limitation of the adaptive selling literature is that it focuses on adaptive selling behaviors without defining what those behaviors are (Evans et al. 2012). Recognizing this limitation, McFarland, Challagalla and Shervani (2006) identify the relevant underlying behaviors as salesperson influence tactics (what they term seller influence tactics or more simply SITs). Their research shows that the better that salespeople are at identifying differences in buyers, the better able they are to adaptively use the most effective category of influence tactics with those buyers.

As firms increasingly use multiple channels of distribution including interactive, online channels, the opportunity to seamlessly integrate these channels has been enhanced. The advantages of cross-channel selling were recognized over two decades ago (Moriarty and Moran 1990), and rather than replacing the traditional channels, electronic channels should support and complement existing channels (Wilson and Daniel 2007). Hence, it is common that companies simultaneously utilize both electronic channels and the more traditional sales channels, such as personal selling (Rosenbloom 2007).

The purpose of this research is to integrate adaptive selling theory and influence tactics theory within a multi-channel setting, juxtaposing online and offline sales interactions longitudinally. This study focuses on professional salespeople selling offline and adaptively using different influence tactics optimized to specific customers. The choice of influence tactics used by salespeople is informed by online customer click-through data obtained through an earlier e-mail advertising received by the customer. To investigate this, we conducted a field experiment with a financial services company selling real products to real customers. This research thus contributes to the literature and contributes to managerial practice by examining the adaptive use of influence tactics in cross-channel, cross-platform selling to improve customer satisfaction, salesperson's job satisfaction and sales outcomes.

**Theory**

Influence tactics are communicated influence attempts that an influencer uses in order to persuade the target of influence (Frazier and Summers 1984). Previous research states that different influence tactics have diverse impacts on different buyers (McFarland et al. 2006). While the literature is abundant with research that demonstrates that knowing your customer pays off (e.g., Román and Iacobucci 2010), we study how prior knowledge of responses to influence tactics communicated through an e-mail advertisement impacts the effectiveness of subsequent influence tactics used in a professional telephone sales call. To our knowledge, this is the first paper to examine the adaptive use of sales tactics based on categorizing buyers through earlier online behavior.

Specifically the adaptive selling literature has demonstrated that adapting one's sales approach across buyers and/or buying situations leads to better sales outcomes. The influence tactics literature has demonstrated more specifically that matching the category of sales tactics based on the communication style of buyers pays off (McFarland et al., 2006). Extending this logic, our basic research proposition is that customers will demonstrate a preference for specific influence tactics based on their click-through behavior on earlier email advertisements. Thus, if customers click through advertisements based on rational (emotional) influence tactics, they should be more positively influenced by rational (emotional) influence tactics subsequently used by salespeople in offline sales interactions with the same customer. In this way click through data can drive better influence tactics picks in initial sales interactions. Supposing that customers react consistently to influence tactics across different sales channels media, it is expected that using the "right" influence tactic with a customer increases his or her satisfaction with the salesperson and sales outcomes (Román and Iacobucci 2010).

**Method**

The study consisted of field experiment conducted with a large, well-known financial services firm in Finland. The financial services industry was chosen because it has increasingly been augmenting traditional sales channels with online channels and because financial services products are complex and entail some risk for customers (Fernandez-Sabiote and Román 2012). While not using a brick-and-mortar channel, this firm does have a relatively large sales force that uses both telephone sales and face-to-face sales channels.

The experiment was run in conjunction with a sales campaign that promoted pension insurance for small business owners. The target group was narrowed to companies that employ less than 20 people, and who were not existing customers. The CEO/owner contact information was obtained from a commercial database provider. The experiment consisted of two phases that represent different stages in the sales process: a marketing email promoting the pension insurance and a subsequent telephone sales call. The email consisted of a general informative description of the sold service and two different sales arguments to persuade the customer to click the message. By clicking either link, the customer was forwarded to a website giving more information and providing an opportunity to contact the company to buy the insurance.

The arguments were designed to represent different influence tactics that were as different from each other as possible. According to McFarland, Challagalla and Shervani (2006), "recommendations" and "inspirational appeals" influence different kinds of buyers through different influence mechanisms (with recommendations being a rational tactic and inspirational appeals being an emotional tactic). Recommendations are defined as arguments that are used to convince a customer that products purchased from the salesperson would be beneficial to the customer. Inspirational appeals are requests or proposals that arouse enthusiasm by appealing to the target's values, ideals and aspirations. Based on the definitions, we framed the two arguments as follows:

*Recommendations*: "It is now time to realize your pension plans. Even though retirement might feel far away, you should act now. Act before the law changes in order to ensure that your standard of living remains on its desired level."

*Inspirational appeals*: "Exotic getaways, relaxed days at the summer house, the vineyard of your dreams… Ensure a sweeter pension for you, your family and the key members of your company as long as you can."

The arguments were presented next to each other in the email. The order of the arguments (which one was on the left and which one on the right side) was randomized. In total, 70 customers clicked the recommendations tactic and 47 clicked the inspirational appeals tactic in the e-mail. 2826 customers opened the email but did not click either tactic.

In the second phase, the selling company made phone calls to the customers, who had clicked either link in the email. Salespeople were trained to use either various recommendation influence tactics or various inspirational appeals influence tactics (note that a pilot study was conducted with 41 university students in order to ensure that appropriate recommendations and inspirational appeals influence tactics were used). Immediately after each call, the salespeople filled in a short questionnaire that included the following questions: “How well were you able to use the chosen tactic?” (1–5, 1 = poorly, 5 = very well), and “What was the outcome of the sales call?” (1 = End of negotiations, no deal, 2 = Further negotiations, 3 = Deal). In total, 110 usable cases were collected.

A 2x2 experimental design was used, with customer selected influence tactic from the email (recommendations or inspirational appeals) and the category of influence tactics used by salespeople in the subsequent telephone sales call (recommendations or inspirational appeals). The salespeople were instructed to use recommendations or inspirational appeals, and were informed that these matched the influence tactics clicked by the customer (even though this was only true in half of the cases).

**Results**

To explore the effects of the manipulations, we fit a between-subject MANOVA model to the data. Along our expectations, the interaction between the SIT that the customer responded to and the SIT that the salesperson used on the phone had an effect on the outcome of the call and salesperson’s ability to use the given tactic but the results were not statistically significant ($F$= 3.052, $p$ = .088; $F$= 2.612, $p$ = .113, respectively). However, the direction of the effect was contrary to what we expected: the lowest results were found in the group were the participants had clicked inspirational appeals and the salesperson used the same tactic on the phone (Table 1).

For the main effects, the tactic that the customer had clicked had a significant effect on the call outcome ($F$= 4.210, $p$ = .046) and on the salesperson's ability use the given tactic ($F$= 8.779, $p$ = .005). When the customer had clicked recommendations, the call outcome was better (mean = 1.69, SD = .838) than when the customer had clicked inspirational appeals (mean = 1.36, SD = .492). Similarly, when the customer had clicked recommendations, the salespersons were able to use the given tactic better (mean = 3.65, SD = 1.522) than when the customer had clicked inspirational appeals (mean = 2.68, SD = 1.359).

**Table 1. Treatment group means (standard deviations)**

| Customer clicked | Salesperson used | Call outcome | Ability to use the given SIT |
|---|---|---|---|
| Recommendations | Recommendations | 1.54 (.776) | 3.62 (1.446) |
| Recommendations | Inspirational appeals | 1.85 (.899) | 3.69 (1.653) |
| Inspirational appeals | Recommendations | 1.44 (.511) | 3.06 (1.211) |
| Inspirational appeals | Inspirational appeals | 1.00 (.000) | 1.60 (1.362) |

The results indicate the cognitive effect that the information about the customer's orientation towards a certain influence tactic has on the salesperson. This is in line with Sujan, Sujan and Bettman's (1988) proposition that the salesperson's knowledge structure determines his or her adaptive selling ability. However, contrary to our hypothesis, the consistent use of the SIT is not relevant as customers can react differently to the same tactics in different channels. In fact, the customer's behavior during the earlier sales process phase has the most effect on the later success of the sales activity.

## Conclusion and further research

In the present study, we empirically tested the use of different sales influence tactics in different sales channels to see, whether offline adaptive selling could be optimized through the use of online click-through data. The results indicate that customers do not respond consistently to the same tactics in different channels but, instead, the influence mechanism might depend on the phase of the sales process. More data from different industries and sales contexts are required to make more generalizable conclusions on the topic. The future research should also focus on more complex influence mechanisms and strategies and on the sales process aspect in adaptive cross-channel sales.

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