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Coaching as a Packaged Intervention for Telemarketing Personnel

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ABSTRACT

Prior literature indicates that although the sales function of an organization is a critical element for its success, there is a lack of research on specific actions managers can take to influence sales subordinates. The purpose of the present study was to assess the effects of a coaching package combined with incentives on sales performance for telemarketing personnel in an organizational setting. Following the implementation of the coaching package, there was a substantial increase in critical behaviors performed, pending sales set, and final sales completed by all telemarketers.

KEYWORDS
coaching; incentives; sales; telemarketing

The sales function of an organization is an important element for the success of many businesses and represents one of the primary ways in which value is created between a business and its customers (Haas, Snehota, & Crsaro, 2012). Despite the clear significance, and large volume of writings on sales, there still remains a shortage of scientific research on the specific actions managers can take to influence sales subordinates, a shortcoming lamented by many other authors (Ellinger, Ellinger, & Keller, 2003; Evers, Brouwers, & Tomic, 2006; Piercy, Cravens, & Lane, 2012).

One rare example by Crawley, Adler, O'Brien, and Duffy (1982) involved behavioral research that was done in a retail chain store, which focused on furniture and appliance sales. Through observation, researchers developed a sequence of specific behaviors and steps that commonly produced a sale. The intervention involved the provision of feedback based on behavior and results measures. The coach prompted critical behaviors, which the sales representative performed below standard. Additionally, the coach reinforced the sales representative's behavior by smiling or gesturing immediately after the appropriate behavior was performed. Along with clarification and coaching of desired behaviors, sales representatives were also given contingent rewards dependent on meeting their behavioral goals. Tokens were awarded, which could be exchanged for activities, personal items, or monetary

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incentives. The results of the study indicated that sales increased by an average of 30%, with a range of 18% to 63%.

Although Crawley et al. (1982) offer an excellent example of a behavioral technique applied successfully, such exemplars are rare, and little research has been done recently to expand the behavioral sales literature. More comprehensive research into sales improvement approaches is needed given that current organizational strategies for improving salesperson behaviors are limited in their potential to improve sales long-term. Such strategies include personnel selection and employee training. Selection procedures as typically implemented rely heavily on identifying individuals who possess the necessary and desirable traits in order to succeed in sales. The specific traits that are most beneficial are debatable, and uncertainty exists concerning which exact behaviors are suggestive of a "natural" sales person (Shannahan, Bush, & Shannahan, 2013). Although individuals with a seemingly natural ability to be effective salespeople may be more easily guided, those individuals who lack such "natural" ability may develop the necessary skillsets when presented with supporting contingencies.

While training may garner high satisfaction ratings from participants, and even lead to increased knowledge, a missing critical component remains the application of that knowledge. Commonly, sales managers have pointed out that salespeople do not always behave as they have been trained to behave, and much of the behavioral literature has cautioned against assuming that behaviors will maintain over time and generalize across settings (Conard, Johnson, Morrison, & Ditzian, 2016). As Martinko, Casey, and Fadil (2001) suggest, what is needed is a formal approach to supplement knowledge employees acquire through training, and ensure this process is effective on a regular basis. Strengthening and enhancing the typical sales process requires improved communication, clarification, and regular support; not training that is redundant with already acquired knowledge.

Coaching has been proposed as an effective alternative to training alone given that it promotes ongoing interactions (after the initial learning process), which are designed to facilitate the transfer of knowledge to the job setting and support performance improvements long-term (Corcoran, Petersen, Baitch, & Barrett, 1995). According to a study (Evers et al., 2006) that compared the outcome of training versus coaching, it was found that coaching was significantly more effective than training. Participants who received training increased their performance by 22%, whereas those who received coaching increased their performance by 88%. This substantial increase in performance suggests that coaching may be a choice intervention compared to training alone and could likely lead to greater success when combined with other interventions that have also proven to be effective.

For the purposes of this article, coaching will be conceptualized as *an individualized approach consisting of prompting, modeling, and differential* *evaluative feedback regarding job performance that is provided on an ongoing and frequent basis to employees*. Such a conceptualization fits with many of the common discussions of coaching while also being operationalized adequately enough to foster empirical investigations.

Often, when paid solely for securing a sale, sales representatives will not always emit all the correct behaviors given that they typically believe a sale can be made without having to do so. However, in the long-run, failing to emit a portion of correct behaviors may have a significant impact on results (Laipple, 2006). Frequent feedback may be needed to offset this common loss of precision. Studies have indicated that feedback can be a particularly effective consequence when attempting to increase performance, specifically with regard to clarifying one's role within a position. This clarification has been found to lead to self-reported increases in satisfaction, motivation, and ultimately higher levels of performance (Verbeke, Dietz, & Verwaal, 2011). Although feedback has been proven to be effective at increasing performance, research has shown more dramatic increases in performance when it is used in combination with other coaching components. For example, task clarification and contingent reinforcement, along with feedback have been shown to significantly improve performance by increasing specific desired behaviors that are more likely to result in a sale (Casey, 1990). These elements could be conceptualized as the prompting and evaluative elements of coaching.

One reason sales representatives may continue neglecting key sales behaviors without mediated feedback is that they will be periodically successful in obtaining short-term sales despite emitting incorrect or undesirable behaviors. This brings up the issue of considering which dependent measures should be used. Traditionally, there is a tendency for sales managers to focus on outcomes rather than behaviors (Churchill, Ford, Hartley, & Walker, 1985). One reason for the popularity of this approach could be due to the convenience and ease of collecting measures that are readily available. Although convenient, there are potential drawbacks. For instance, because there is often a sole interest in short-term sales volume alone, the salesperson may be less focused on maintaining active accounts and ensuring that the customer has a good experience once the sale is made. This could ultimately have a long-term negative impact on company reputation and repeat business (Anderson & Oliver, 1987).

Many studies suggest that it may be most beneficial to focus on both sales-related behaviors and results. For instance, Casey (1990) reviewed 18 experiments pertaining to sales performance. A portion of these studies attempted to manipulate sales-related behaviors (e.g., showing customers the merchandise, smiling, or being available for the customer). Other studies assessed elements that directly influenced sales volume (e.g., sales total per hour, number of items sold per customer, or average meal price). The final portion of studies assessed the two approaches together (i.e., sales related behaviors and sales volume). Results indicated that the combined approach was most effective in terms of increasing profits. Therefore, research suggests it is important to incorporate a mixed model when selecting sales targets.

Regarding measures, self-report data are highly prevalent within the sales literature and have been integrated into the research design of many studies (e.g., see: Ellinger et al., 2003; Evers et al., 2006; Fang, Evans, & Zou, 2005; Mackenzie, Podsakoff, & Rich, 2001; Martin & Bush, 2006; Onyemah, 2009; Piercy et al., 2012). Although they are often equated with objective measures, no evidence supports the notion that objective and subjective measures are interchangeable (Rich, Bommer, Mackenzie, Podsakoff, & Johnson, 1999). Not only is the literature too reliant on self-report and other forms of indirect measurement, it is also not unusual for pertinent details concerning the process to be omitted. Additionally, many studies omit details concerning important contextual factors, which may affect the generalizability of the results. Examples of these overlooked considerations in coaching commonly include the salesperson's training, degree of coaching, nature of feedback delivery, and the type of compensation system (Gupton & LeBow, 1971).

Although coaching is a potentially effective intervention for sales improvement, other interventions such as incentives may be included. The combined effects of coaching and incentives may prove to be a more potent intervention package, allowing for maximum performance gains to be realized. Recent studies have concluded that incentives are particularly effective in producing high-level performance. Consistent findings indicate that there are significant increases in sales volume during contests, thus supporting the notion that salespeople have the potential to increase their performance when the appropriate behavioral contingencies have been put in place (Mirman, 1982).

The overall findings of the aforementioned literature indicate that although the sales function of an organization is a critical element for its success, there is a lack of research on specific actions managers can take to influence sales subordinates. Many companies have narrowed their focus to both training and selection despite the apparent shortcomings associated with both of these sales improvement strategies. In doing this, there is much less emphasis on attempting to teach specific sales behaviors. Coaching has been proposed as an effective alternative given the multidimensional nature of this approach, which integrates prompting, feedback, and evaluation. Coaching can also be easily combined with other performance improvement strategies such as incentives. Common shortcomings of previous sales coaching literature include a reliance on self-report data due to a tendency to equate it with more objective measures. This ultimately has led to a significant gap in current literature with regard to direct observation and experimentation. The present study aimed to fill that gap by using direct observation in assessing the effects of a coaching package combined with incentives on sales performance, with performance being defined by (a) the percentage of critical behaviors performed by the telemarketer during each "opportunity," (b) the percentage of pending sales completed by the telemarketer out of the number of "opportunities," and (c) the percentage of successful phone sales completed by the telemarketer out of the number of "opportunities" in the population of three telemarketing personnel in a company setting.

Method

Setting and materials

The study was conducted within the marketing department of a small window company. Each telemarketer was seated within a private room that contained the following materials: desk, telephone, computer, keyboard, monitor, and mouse. The phone was equipped to allow a second and third party to listen-in to phone calls for evaluation purposes. Additionally, an overhead projector was used for task clarification. A calendar was also used for the purpose of task assignment. Beside the desk of each telemarketer was a sales board that tracked sales for that pay period. An appointment was considered a "pending sale" under a specific telemarketer if that telemarketer set a follow-up appointment with the potential customer. The appointment was updated to a "final sale" once the in-home representative visited the customer at the home and convinced the customer to sign an agreement to purchase products. The sales board was separated into two halves, with one half of the board reserved for pending sales and the other half reserved for final sales. Velcro strips were attached to each board so that tokens earned from that week could be easily secured to it. Red, green, blue, white, and black poker chips were used as tokens.

Downloaded on each computer was a database designed to organize customer information. Telemarketers would access the customer database to identify customers who had called the company expressing interest in the product, seen an in-home demonstration of the product, and decided not to purchase during the initial appointment with the in-home sales representative. Part of the telemarketers' job was to contact customers to assess how the appointment went and determine why the customer did not purchase during the prior appointment. The primary goal of this follow-up call was to convince the customer to allow a second sales representative to visit the customer's home so the company could make another attempt to sell the customer the product. If the customer showed interest, the telemarketer scheduled a follow-up appointment to have another sales representative visit the customer's home to double check the measurements, go over the price, and attempt to complete the sale.

The customer database also provided information on previously quoted prices, whether the customer was eligible for further discounts, and key verbiage to be followed during the attempt to secure a follow-up appointment. The verbiage outlined on this checklist was identified by a previous manager of the department during hundreds of interactions with customers and after observing high performers and noting specific terminology that tended to lead to a pending sale. The specific verbiage used on the checklist is proprietary in nature and therefore could not be included in full form. However, a less specific version has been provided in Appendix A. The coaches were two research assistants who were trained by a previous manager in the department using the behavior checklist and scripts. The first coach was a 27-year-old male with no sales experience. The second coach was a 21-year-old female with limited sales experience. Neither had worked in the home improvement industry prior to being selected for the study. To supplement the behavior checklist and scripts, there was a PowerPoint presentation, learning objectives, answers, and flashcards. The flashcards were necessary to assist the telemarketers with becoming fluent with key phrases outlined on the behavior checklist.

Prior to baseline, the company typically did not track sales behaviors and therefore could not provide feedback on specific sales behaviors. The primary reason a customer did not purchase during the initial appointment was referred to as the sales objection. Before the intervention was implemented, the telemarketers did not practice overcoming every possible sales objection. The company also did not listen-in to the calls to provide frequent feedback on performance.

Participants

The entire marketing department participated in this study, which consisted of four female employees, ranging in age from 20–27. The first and second participants had worked for the company for less than a year. The third and fourth participants had worked at the company for approximately three years.

Dependent variables

Three dependent variables were examined, namely (a) the percentage of critical behaviors performed by the telemarketer during each "opportunity," (b) the percentage of pending sales set by the telemarketer out of the number of "opportunities," and (c) the percentage of successful phone sales completed by the telemarketer out of the number of "opportunities."

Definition of call opportunities

The number of calls made per day varied based on the number of opportunities. This depended on the number of customers who called in with interest in having an estimate and this fluctuated based on a number of variables. Approximately 5–15 calls were made during each call session and there were two call sessions scheduled each day. Data were collected for 100% of calls that were determined to be true call opportunities. To be considered an opportunity, the call must have met the following criteria:

(1) The customer's information must have been marked with a "Did-Not-Sell" status in the customer database with no managerial notes to discontinue sales efforts.
(2) The potential customer must have answered the phone and had to have been a household decision maker.
(3) The customer could not have been a repeated follow-up attempt for the telemarketers. In other words, if one of the telemarketers had already spoken with a potential customer and was unable to set a follow-up appointment during the initial contact, this was updated as "No Sale" and that telemarketer could not continue to call that customer.

The first dependent variable was the percent of critical behaviors performed by the telemarketer during each "opportunity." The critical behaviors were assessed using the behavior checklist. The coach listened-in to each phone call and checked off the behaviors on the behavior checklist as the telemarketer completed them during each opportunity. This checklist contained 11 of the most critical behaviors performed when attempting to secure a phone sale according to past high performers.

The second dependent variable was the percent of pending sales completed by the telemarketer out of the number of "opportunities." As mentioned, an appointment was considered "pending" under a specific telemarketer if that telemarketer scheduled the customer with a follow-up appointment. It is critical to note that the appointment did not have to be "confirmed" to be considered "pending." To be considered pending, an appointment date simply had to be entered into the customer database after the customer agreed to schedule a follow-up appointment. Therefore, if the telemarketer scheduled a potential customer a few days after the follow-up call, the appointment was still considered "pending" prior to confirmation. All pending appointments were tracked by the research assistant.

The final sale was a team effort between the telemarketer who set the follow-up appointment and the in-home representative who visited the customer's home to complete the sale. Although the telemarketer was not directly responsible for obtaining the signature that completed the final sale, she remained an integral part of the process. If telemarketers were unable to convince the customers to schedule follow-up appointments, there would be no opportunities for in-home representatives to complete sales. If the telemarketers were doing their job properly, this would be reflected in the financial measures.

In order for a product to have been considered sold under a specific telemarketer, the telemarketer must have informed the customer of any qualified discounts and scheduled the customer with a follow-up appointment. The company representative who attended the follow-up appointment must have persuaded the customer to sign a contract during the time of the follow-up appointment that was set by that telemarketer. After all pending dates had passed and everything was updated, the researcher calculated the telemarketer's sales percentage by dividing the number of sales by the total number of call opportunities.

Independent variables

The intervention was a packaged intervention that took into account sales behaviors and sales volume. Specifically, it was a coaching procedure that contained the following components: task clarification, role modeling, practicing one's skills, prompts to increase desired behavior, feedback that was frequent and contingent on performance, and contingent token delivery.

Task clarification

Task clarification contained the following components:

Distribution of scripts, critical behaviors, learning objectives, and answers. The coach distributed scripts, a behavior checklist, learning objectives, and answers to each participant that were designed to aid the participants in making phone sales and provide them with a better understanding of what was expected of them during each call opportunity. This task lasted approximately 30 minutes in duration.

Presentation of scripts and critical behaviors. The coach delivered a 45-minute PowerPoint presentation covering the scripts and the critical behaviors that were to be used by the telemarketers. This included an introduction script that was designed to guide the telemarketer in making the initial contact with the customer and assist with determining the sales objection. Each telemarketer's primary goal was to overcome that sales objection to increase the likelihood of scheduling a follow-up appointment so that a sale could be secured.

Following the introduction script were five objection scripts that outlined how to overcome the most common sales objections concerning why the customer may not have purchased. For instance, if there was a price objection, the telemarketer was directed to a script relevant to pricing. If the customer did not purchase because other estimates were obtained, the telemarketer was directed to a different script. Other scripts included sales representative objections, product objections, and unclear sales objections. Each script varied slightly based on the specific objection it was designed to overcome; however, despite their variance, the scripts were similar in that they contained all of the specific verbiage (key sales questions and phrases) outlined in the behavior checklist.

Practice of skills. Immediately following the PowerPoint presentation, the telemarketer was directed to a room where she reviewed flashcards independently for 30 minutes. These flashcards covered the relevant material pertaining to the objectives, behavior checklist, and scripts to ensure the telemarketer became well-versed with the material. There was no instruction provided on the method of study during this period of independent practice. The main purpose of this 30-minute session was to simply allow the telemarketer to begin orienting toward and reviewing the flashcards to become more familiar with the type of questions the coach would be presenting when they were practicing together. Once the 30 minutes had passed, the coach returned to the room to practice the flashcards together for an additional 30 minutes. The coaches were told to only have the participants learn three to four flashcards at a time depending on the response requirement of each flashcard. If the coach judged the answer on one or more of the cards to be especially lengthy or complex, the coach would have the participant learn three cards rather than four. The coach would present each flashcard to the participant one at a time and have the participant recite what was on the back of the flashcard. If the telemarketer was unable to recite the verbiage on the back of the card, the coach would provide feedback, making the participant aware of the correct verbiage. The coach continued to practice with the telemarketer for an hour together each day until the telemarketer could respond both quickly and correctly. When considering the criteria for mastery, a portion of the cards had to be recited word for word and this was indicated on the card. These were the cards in which it was determined that exact wording would likely heavily impact the success of a phone sale. However, a portion of the cards did allow for a bit more flexibility in the wording provided the telemarketer was able to list all components on the card correctly if the card contained a list of items. No participant took more than three sessions to meet these criteria.

Along with the flashcard practice, the coach also modeled how to identify and use the scripts. Doing this allowed the coach to demonstrate how to correctly carryout each of the critical behaviors on the behavior checklist. Once the modeling was complete, the telemarketer practiced using each script by role-playing with the coach. Specifically, the telemarketer practiced using the introduction script and the coach provided potential objections at random. The telemarketer was expected to tell the coach which script would fit with the objection that was presented. The two continued with practice until the coach had gone through all potential objections and the telemarketer was able to identify the proper script on at least 90% of the trials. Once this step was completed, the telemarketer practiced using the various scripts while the coach provided feedback after each role-play session. The two continued practicing with a particular script until the telemarketer was able to consistently perform at least 90% of the behaviors on the behavior checklist when using the script. Once this criterion for mastery for a specific script was met the coach and telemarketer moved on to the next script and the process continued until the telemarketer had achieved mastery using all of the scripts. The total amount of time spent on task clarification, presentation of scripts and critical behaviors, and practice varied between participants depending on the particular participant's speed of acquisition. Weekly follow-up meetings were held during which the telemarketer(s) in the intervention condition and the coach discussed the challenges experienced during the previous week and practiced overcoming those challenges.

Prompts to increase desired behavior

The critical behaviors within each script were highlighted to direct the telemarketer's attention to them during the call. Each telemarketer also had access to the behavior checklist and was encouraged to refer to it often when speaking with customers during a potential phone sale.

Frequent and contingent feedback

As mentioned, following each practice session, the telemarketer provided feedback to the coach. They switched roles, and the coach provided feedback to the telemarketer that was based on the behavior checklist. Once the practice and modeling sessions were complete, the telemarketers began calling potential customers. The coach sat next to the telemarketer and filled out the behavior checklist. When the call was completed, the coach provided feedback that was based on the behavior checklist and took time to answer any questions. If the telemarketer performed 80% or more of the behaviors, the coach provided praise.

Contingent token delivery

Beside the desk of each telemarketer was the sales board which was used to track their individual sales for that pay period. Poker chips were used as tokens with different colors representing the dollar amount of each sale. \$1,000–\$2,999 earned a red chip, \$3,000–4,999 earned a blue chip, \$5,000–\$6,999 earned a green chip, and \$7,000 and higher earned a black chip. If the telemarketer performed 80% or more of the behaviors listed on the checklist and scheduled the customer with a follow-up appointment, the researcher provided the telemarketer with a white poker chip. The white poker chip acted as a place holder until it was clear that the sale had been completed and how much the sale earned. More important, the moment in which the white poker chip was awarded was also a time for social recognition and praise. Once the sale was completed and it was clear how much the deal sold for, the telemarketer removed the white chip from the right side of the board and exchanged it for a colored chip that corresponded with the dollar amount that it sold for.

Public praise at meetings

Along with feedback and practice, the telemarketers were given the opportunity to receive public praise during the weekly meetings described above. Each telemarketer was asked to bring an incentive board, displaying the tokens earned to these meetings. Prior to discussing the challenges faced during the previous week, the telemarketers were asked to show the number of sales or pending sales earned from the previous week. The coach attended these meetings along with all of the telemarketers who were in the intervention condition.

Research design

A concurrent multiple baseline across participants design was used to assess differences in performance between conditions. These data were collected across customer interactions to provide a consistent metric encompassing different schedules and sales opportunities. Baseline data were collected for all participants prior to the implementation of the intervention. After approximately 3 weeks of baseline data were collected, the coaching intervention was introduced for the first participant. After the first participant had been calling for approximately 2 weeks, the coaching intervention was introduced for the second participant. It was then introduced for the remaining participants in a similar fashion.

Interobserver agreement

Interobserver agreement (IOA) data were based on observations pertaining to the behavior checklist. The coach and researcher each tracked whether the telemarketer correctly carried out each of the behaviors listed on the behavior checklist during a call opportunity using the right-hand column of the behavior checklist. IOA was conducted for approximately 40% of all call opportunities. Both the coach and research assistant listened-in to a call to determine if the behaviors were being correctly performed and compared their responses.

IOA was calculated by taking the number of agreements and dividing them by the sum of agreements and disagreements. The resulting number was then multiplied by 100 to obtain the percentage of IOA. If the IOA fell below 80% for any of the research assistants, the two observers met immediately after that call period to discuss why they had marked what they did, reconsider the definition for how they were tracking each of the behaviors, and to determine where the mistake was made so that a mistake would be less likely to occur in the future.

Procedures

Baseline phase

Behavioral and sales data were collected during each phone call for each participant. To collect data, a coach sat next to each telemarketer during her phone calls to assess the telemarketer's behavior using the behavior checklist. The coach also recorded if the opportunity had led to a pending sale and tracked it to determine if eventually a final sale was secured, and updated the data log accordingly.

Coaching phase

Prior to a coaching presentation, the coach distributed the scripts, behavior checklist, learning objectives, and answers to the participant for a brief review. After this review of the material, the coach gave a presentation over the scripts and critical behaviors. Immediately following the presentation, the telemarketer was directed to a private room to review the flashcards independently initially, and then practiced flashcards with the coach's assistance.

The day after the final flashcard practice session was complete, the coach and the telemarketer began with role modeling and applied practice. During their first role-play session, the telemarketer practiced using the introduction script to identify potential sales objections. The coach took on the role of the customer and the telemarketer continued in the role of telemarketer. The telemarketer read through the introduction script and the coach presented potential objections at random, and the telemarketer was expected to tell the coach which script would fit with the presented sales objection. The coach provided feedback after each selection to let the telemarketer know if the selection was correct. The two continued with practice until they had gone through all the potential objections and the telemarketer was able to identify the proper script at least 90% of the time during that session.

Once practice with the introduction script was complete, the telemarketer took on the role of the customer, and the coach took on the role of the telemarketer. The coach then continued using the introduction script and modeled for the telemarketer how to use the scripts describing how to overcome common sales objections. The telemarketer checked off the critical behaviors on the list as the coach modeled them. The coach and telemarketer would also switch roles so that the telemarketer would state which behaviors on the behavior checklist were carried out and which behaviors were not carried out. The two continued with practice until the telemarketer was able to consistently perform at least 90% of the behaviors on the behavior checklist during that session. This process continued for all scripts related to objections.

The day after the telemarketer practiced all of the scripts in order, the coach took on the role of the customer and provided objections to the telemarketer at random. The telemarketer then practiced synthesizing her skills by using the introduction script to determine the objection, and then selecting the appropriate script that corresponded with that objection, and applying that script properly. The coach again provided feedback after each role-play session using the behavior checklist. This process was estimated to take approximately an hour.

The coach congratulated each telemarketer upon completion of the final practice session and read a script that explained how the feedback and tokens would be implemented. The coach then presented the telemarketer with a board with the telemarketer's name on it that aided the telemarketer in keeping track of tokens. Each telemarketer was told that there would be weekly follow-up meetings on progress and to bring the board to each meeting.

Approximately a week after the telemarketers began calling customers, they attended their first telemarketing meeting. This meeting was estimated to be a half hour in duration. The coach began the meeting by asking the telemarketer(s) to share the challenges faced during the preceding week. The coach modeled how to overcome each challenge as the telemarketer(s) filled out the behavior checklists. Afterward, each telemarketer provided the coach with feedback pertaining to the behavior checklist(s). The coach and telemarketer(s) then switched roles and each practiced how to overcome the challenges faced from the preceding week as the coach and the other team members filled out the behavior checklists. Each team member then received feedback from the coach and teammates based on the behavior checklist. The meeting concluded with public praise. Each telemarketer displayed the number of tokens earned from the previous week, and was congratulated on performance by the coach and the rest of the team.

The same day of the final practice session, the coach and the first participant went to a private room where the telemarketer contacted all the customers that appeared within the customer database to attempt to set a follow-up appointment for each potential customer. The coach listened-in, provided feedback, and praised if appropriate, and provided a token if the telemarketer successfully changed the customer status to pending and performed 80% or more of the behaviors on the behavior checklist. The coach also tracked the results. When the study concluded, the participants were asked to complete the social validity questionnaire (Appendix B) and return it to the research assistant. The social validity questionnaire was in survey format and contained 10 questions that prompted the participant to respond with yes or no, helpful or not necessary, and also enabled the participant to make a choice from a list of options. This survey was designed to solicit the participant's opinion concerning the helpfulness of various components of the coaching intervention.

Results

Behavioral data

Figure 1 illustrates the percentage of critical behaviors performed during each opportunity for each participant during the baseline and intervention conditions. The open and closed circles represent whether each opportunity led to a sale (opened circles) or no sale (closed circles). The first participant, Sarah, performed an average of 16% of critical behaviors, which increased to an average of 68% during the intervention condition. Karen's average percent of critical behaviors increased from the baseline level of 4% to 63% during the intervention condition. The third participant, Charlene, performed an average of 24% of critical behaviors during baseline, which was increased to an average of 49% during the intervention condition. Finally, the fourth participant, Kristin, averaged 29% in baseline and 93% in intervention. As a whole, the group average percentage of critical behaviors performed by the four participants during baseline was 21% . After the coaching package was implemented, the average increased to 67%.

Sales data

Pending sales

Figure 2 illustrates the percentage of pending sales set in baseline and intervention for each of the four participants. This was determined by dividing the number of pending sales for each participant by the total number of opportunities for that participant. During baseline, Sarah set a pending appointment for 21% of the call opportunities. After implementation of the coaching package, 58% of call opportunities were set with a pending appointment. During baseline, Karen initially set 17% of the call opportunities with a pending appointment and this increased to 39% in the intervention condition. Charlene showed an increase in pending appointments set from baseline to intervention of 32% to 56%. Finally, Kristin set 36% of the call opportunities with a pending appointment in baseline and this increased to 100% in the intervention condition. Overall, the mean group

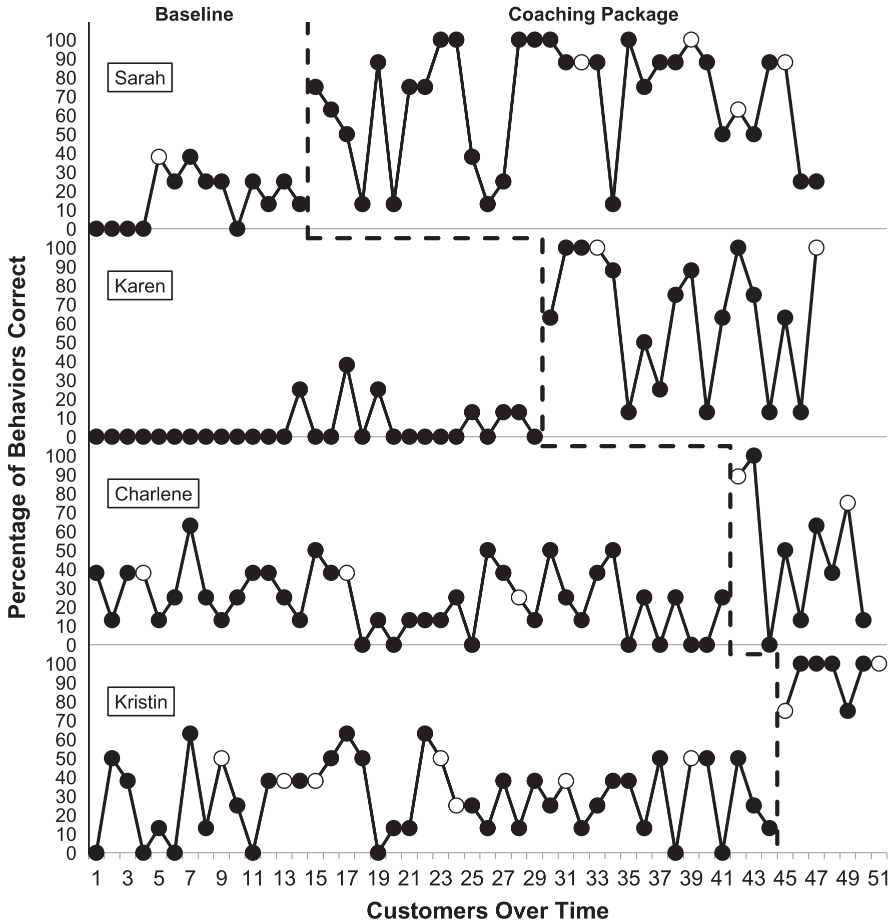

Figure 1. Percentage of correct behaviors performed across participants; open circles indicate a sale and closed circles indicate no sale.

percentage of pending sales to the number of opportunities in the baseline condition was 29%. This increased to a mean group percentage of 57% in the intervention condition.

Final sales

Figure 3 illustrates the percentage of final sales completed in baseline and intervention for each of the four participants. This was determined by dividing the number of final sales completed for each participant by the total number of opportunities for that participant. In baseline, 7% of Sarah's call opportunities resulted in a final sale. This increased to 12% in the intervention condition. Karen had 0% of the call opportunities result in a final sale during baseline and this increased to 11% in the intervention condition. When considering the final sales percentage in baseline and intervention, Charlene had an increase from 7% to 22%. Kristin also

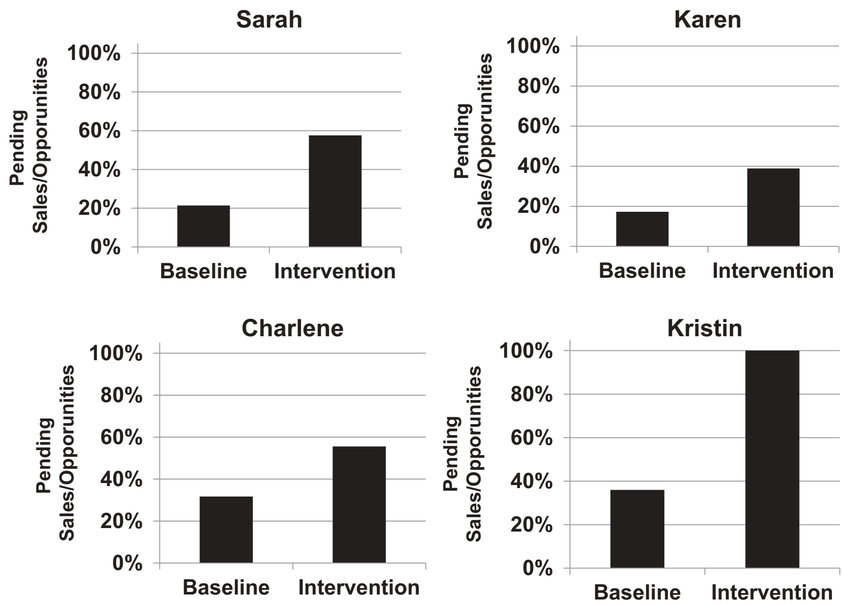

Figure 2. Pending sales set across participants.

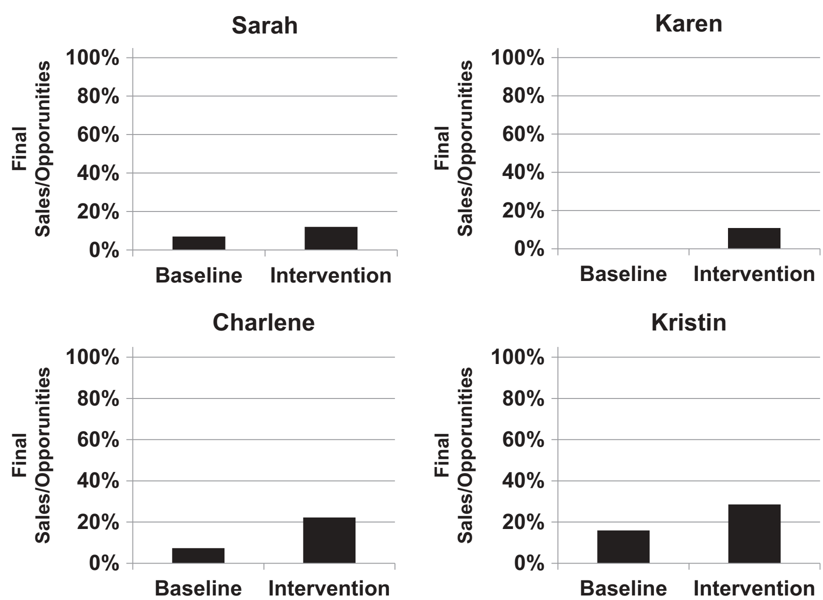

Figure 3. Final sales completed across participants.

increased her percentage from baseline to intervention with a baseline percentage of 16%, which increased to 29% in the intervention condition. The group percentage of final sales completed to number of opportunities was 9% in baseline, and increased to 15% in the intervention condition.

Social validity

Two of the four participants selected a positive response option for all questions suggesting that these participants found all of the components to be helpful and/or necessary. Overall, these participants indicated that the study contained effective incentives, and was a positive experience that helped them to improve their sales skills. When considering the remaining two participants, one responded favorably to all but one question ("Do you believe the tokens influenced your desire to carry out the behaviors listed on the behavior checklist?"), indicating that the tokens were an effective incentive. The remaining participant responded "no" or "not necessary" to six of the questions indicating that many of the items were not found to be helpful, or necessary. Additionally, she did not feel sales were improved by the coaching intervention. However, the participant reported that the provision of feedback following each call and appointment was helpful and the participant had a better idea of what was expected due to participation in the study. With regard to the specific intervention component that each participant believed to be the most helpful, half of the participants indicated that they believed "Clarifying which behaviors were expected using a checklist" was the most helpful component while the remaining half reported that "Modeling the behaviors that were expected" was the most helpful. As a whole, the results of the social validity data indicate that the participants believed the coaching intervention to be helpful. It is also apparent that the clarification of specific behaviors and modeling were believed to be the most helpful components of the coaching package compared to provision of feedback and token incentives.

Discussion

All of the participants substantially increased their average critical behavior percentage from baseline to intervention with Charlene, Kristin, Sarah, and Karen increasing their scores by a factor of 2, 3, 4, and 15, respectively. Each of the participants also substantially increased the number of pending sales set from baseline to intervention, and the group percentage of final sales to opportunities in intervention was 3 percentage points shy of double the baseline level. Thus, the effects of the coaching package were to increase the group percentage, as well as each participant's individual percentage of critical behaviors performed along with pending sales set, and final sales completed.

While each participant varied in their initial baseline levels of performance, all were able to substantially increase performance after implementation of intervention. Through coaching, each participant was provided with the materials, instruction, and support needed to expand repertoire on the subject. The scripts, flashcards, and practice aided in achieving fluency and ultimately enabled each telemarketer to carry out the critical behaviors during an actual sales call.

In addition to strategically selecting candidates, training has also been a choice approach for managers and supervisors when attempting to increase the performance of a sales team. As mentioned, there appears to be little empirical evidence to support the notion that training (as it is typically conducted), will result in long-term improvements (Mirman, 1982). Recall that Evers et al. (2006) compared the outcome of training versus coaching and found that while training led to a 22% increase in performance, the performance of participants who received coaching increased by 88%. Consistent with these findings, results of the present study show that the comprehensive approach achieved through coaching appears to have surpassed performance increases that would be expected using training alone. During baseline, the average percentage of critical behaviors performed by the four participants was 21%. After the intervention was implemented, the average increased to 67%. Subsequently, the group percentage of pending sales set raised from 29% to 57%, which was almost double that of the initial percentage. Finally, the group percentage of final sales increased from 9% to 15%, which is also a substantial increase.

When considering the financial benefits incurred through the coaching program, if the number of call opportunities was extrapolated over the course of a year, there would be approximately 585 call opportunities. Prior to implementation of the coaching program, approximately 9% of those opportunities could have been expected to have been converted to sales (about 53 sales). After the coaching intervention was in place, this percentage was increased to 15% (about 88 sales), or 35 additional sales. According to a report provided by HomeAdvisor (2017), the average national cost of window installation was estimated to be approximately $4,982 with a range between $2,608 and $7,389. With this in mind, the company could have anticipated to earn an estimated $174,370 in additional sales over the course of the first year.

In terms of costs, the total cost for telemarketer coaching time over the course of the first year is estimated at $1,000-$2000. The cost of coaching services by a professional consulting firm is estimated at $11,000–$22,000. With approximately $175,000 additional sales, the return on investment would be about 1:8.

It is interesting that the coaches in the study were two graduate research investigators who did not have much background in sales. One had no sales experience prior to being selected for the study. The other had limited sales experience and no experience in phone sales. Neither had worked in the home improvement industry prior to being selected for the study. Still, the coaching intervention was effective in increasing critical behaviors, pending sales, and final sales. Part of the reason each of these individuals were effective coaches may have had to do with pinpointing the specific behaviors required to make a sale. Pinpointing simplifies the process of selling and might also simplify the process of coaching.

Although the findings were significant, there was still much variability in the data. There were times when, although the telemarketer was being coached, the number of critical behaviors dropped significantly relative to the previous opportunity. Perhaps the primary reason for this discrepancy had to do with the customer's receptiveness to the questions. Some customers simply did not allow the telemarketer to complete the questions to carry out each of the critical behaviors. These calls, however, were still considered opportunities as long as the telemarketer was speaking with one of the household decision makers. The procedure for data-collection remained consistent for all call-opportunities and the behavioral percentage for the call was based on the entire checklist even for the more dismissive customers. The rationale for this was grounded in the notion that the profession of sales may lend itself to encountering customers who are not interested. Strong sales personnel may be able to spark interest and build urgency where none appears to exist. The key behaviors were designed to help the telemarketer by enticing customers with a discount or pointing out that the customer qualified for a specific reason. Despite the variability, it is still clear that there was an overall increase in level for each participant's performance of the critical behaviors.

While the intervention was determined to be effective, this study is not without limitations. For instance, no data were collected on treatment integrity. Additionally, when considering the flashcard practice, while the coaches were instructed to have their participants only learn three to four flashcards at a time and make the participant aware of the correct verbiage after an incorrect response was given, there was no specific instruction pertaining to the modality of feedback the coach was to provide. It is possible that verbal and/or visual feedback was given, which may have influenced the effectiveness of the flashcard practice.

It may also have been interesting to collect data on the reactions of the customers. There is the possibility that applying a different approach may have pressured customers, which could have affected their long-term loyalty to the company. That said, it should also be noted that without reaching out to those customers, they would likely not have purchased at all, or purchased elsewhere based on past customer tendencies reported by the company. Therefore, given this consideration, convincing them to become a customer likely promoted loyalty rather than hindered it.

It is also of interest that Kristin convinced 100% of her potential customers to set a pending sale and it would be helpful to consider why. As mentioned, Kristin had been working at the company for longer and therefore had more experience in phone sales. It is possible that Kristin's high performance was due to previous experience she had with phone sales. Perhaps she was more easily able to capitalize on what she had been taught in the coaching sessions due to her prior experience. Future research could explore this further by selecting participants who had a similar number of years of experience to determine if they could also reach pending percentages similar to those obtained by Kristin.

The history of the participants also becomes relevant with regard to social validity. Though three of the four participants provided a positive response to nearly all of the questions, one participant indicated that the coaching intervention had not increased sales ability. It is possible that the responses of that participant were influenced by previous sales experience, such that the components of task clarification and modeling did not feel helpful or necessary. It is interesting, however, that the items this participant responded favorably to seemed to focus more on the maintenance aspect of the coaching intervention (e.g., "Was it helpful to receive specific feedback regarding the behavior checklist after each call"). This suggests that those telemarketers who are already familiar with the correct behaviors involved may still benefit from simply introducing continued feedback.

It should also be noted that the coaches were also the data collectors in the study. They tracked the behavioral data by placing checkmarks by each of the critical behaviors as the participant performed them and marked whether the participant set a pending sale after each call opportunity. Additionally, they followed-up by determining if the pending sale was converted to a final sale by the in-home sales representative. It is possible that the mere presence of the coach became a factor that may have influenced telemarketer performance. Unfortunately, the physical setup of the workplace made such presence unavoidable for the purposes of ensuring that behavioral data were tracked accurately. This limits the present study in that the effects of the coach's presence cannot be separated out from other potential causal factors. Even more broadly, it is worth noting that while the intervention was determined to be effective, it was a packaged intervention that consisted of many components. The specific components that were most responsible for the success of the intervention were not separated out and therefore their individual contributions could not be identified. This study does, however, set the stage for future dismantling studies, which can help to identify the specific components of the package that produced the best results. Once the most valuable components are identified, additional future research can begin to further assess the flexibility with which those components can be applied.

Coaching as a packaged intervention was effective at increasing the desired sales behaviors and results for each of the four telemarketing personnel. The results of this study carry important practical implications for managers seeking to improve the performance of their sales team. The data indicate that investing one's temporal and monetary resources into coaching programs that emphasize the provision of clear expectations and continued assessment are likely to provide a significant return. Future research should continue to explore coaching within a sales context and begin dismantling each component to better refine the coaching technique. Further refinement would likely allow for the success of both the managers and team members alike. When managers place an emphasis on coaching and *aiding* in success rather than simply selecting for it, success is made accessible to many. Research is needed in an area that will help pave the way for success to ultimately be experienced by all.

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Appendix A

Behavior Checklist

Date of call: ______________________________

Note highlighted portion indicates that it must be word for word

Behavior Checklist:	√
1. Correctly addressed themselves	
2. Correctly determined the objection according to training	
3. Correctly tailored responses to the customer's specific objection according to training	
4. Correctly explained how the discount works	
5. Correctly explained why the customer qualified for the discount	
6. Did not provide certain critical information over the phone	
7. Explained how long appointment would take according to training	
8. Used proper terminology according to training	
9. Suggested the proper time according to training	
10. Properly asked the customer if the time was convenient according to training	
11. If the customer was unsure of time, provided the proper response according to training	

Code of telemarketer: ____

Customer's first and last name: ____

(1) No sale (check): ____________________

(2) Pending (date it is set): ______________

(3) Sale (check): _______________________

Appendix B

Social Validity Questionnaire

(1) Did the behavioral checklist help you identify what behaviors were most important? **Yes No**

(2) Did you find it helpful to role-play with your coach and watch him or her model the appropriate behaviors listed on the behavioral checklist or did you find that it was not necessary? **Helpful Not necessary**

(3) Was it helpful to receive specific feedback regarding the behavioral checklist after each call from the coach? **Yes No**

(4) Was it helpful to receive specific feedback regarding the behavioral checklist after each appointment from the research assistants? **Yes No**

(5) Do you have a better idea of what is expected of you due to your participation within the study? **Yes No**

(6) Do you believe that the tokens influenced your desire to carry out the behaviors listed on the behavior checklist? **Yes No**

(7) Do you believe recognition from the coach and/or research assistant was an effective incentive? **Yes No**

(8) Did the study improve your sales skills? **Yes No**

(9) What was the **most** helpful part of the study?

  (a) **Clarifying which behaviors were expected using a checklist**
  (b) **Modeling the behaviors that were expected**
  (c) **Provision of feedback**
  (d) **Tokens**

(10) Overall, was the study a positive experience? **Yes No**