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# The Role of Mentoring on Outcome Based Sales Performance: A Qualitative Study from the Insurance Industry

Minna Rollins

*University of West Georgia*

Brian N. Rutherford

*Kennesaw State University, bruther1@kennesaw.edu*

David Nickell

*University of West Georgia, dnickell@westga.edu*

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# The role of mentoring on outcome based sales performance: A qualitative study from the insurance industry

Minna Rollins, University of West Georgia, 1601 Maple St, Carrollton, USA.

Brian Rutherford, Kennesaw State University, Chastain Road, Kennesaw, USA.

David Nickell, University of West Georgia, 1601 Maple Street, Carrollton, USA.

Contact Email: [dnickell@westga.edu](mailto:dnickell@westga.edu)

## Abstract

This study explores informal mentoring on outcome-based salesperson performance. Mentoring is believed to play an important role within corporations, yet little empirical evidence exists on its impact on salesperson performance. The authors interviewed salespeople of an international insurance company regarding mentoring and sales performance. Using a qualitative research approach, the authors explored a mentor's influence on the sales performance of the protégé. The findings suggest that mentoring contributes to salesperson performance in numerous ways. Specifically, mentoring salespeople early in their career can benefit all parties; protégé, mentor, and organization. In addition, mentees will often become mentors themselves.

**Keywords:** informal mentoring, sales management, case study research

## Introduction

Mentoring has an important role in today's corporate setting (Brashear, Bellenger, Boles & Barksdale, 2006). Researchers who have studied the mentoring relationship have found that this relationship can be beneficial for all parties involved: the protégé, the mentor, and the organization (Pullins, Fine, & Warren, 1996). Mentoring increases job satisfaction and earning potential, and decreases employee turnover and intentions to leave (Brashear, et al., 2006; Pullins, et al., 1996). From a sales management viewpoint, these relationships can be used as a means of socialization and acclimatization for salespeople (Fine & Pullins, 1998; Pullins & Fine, 2002). In addition, as more employees retire early, mentoring programs can keep valuable knowledge within a company and provide a competitive edge for recruiting (Marchetti, 2005).

While mentoring research is common in the psychology (Ragins & Scandura, 1997; Soucey & Larose, 2000; Strenger, 2004) and education literature (Cunningham, 2007; Ealy & Kvarita, 2006; Sorrentino, 2006), limited attention has been paid to this stream of research within the sales literature (Brashear, et al., 2006; Fine & Pullins, 1998; Jackson, Hollmann & Gallan, 2006; Pullins, et al., 1996; Pullins & Fine, 2002). Consequently, little evidence exists for sales organizations to determine the best

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practices for implementing a mentoring program, or even if such a program will provide a positive effect on salesperson performance (Brashear, et al., 2006). This study explores how mentoring influences outcome-based salesperson performance; outcome-based performance being the salesperson's output or financial results. With this knowledge in hand, selling firms will better understand what forms of mentoring will lead to increased sales performance and have a better grasp of the costs and benefits of these programs.

This study uses a qualitative research approach. Sales performance data was collected from the sponsoring company, an international insurance carrier. A total of 27 semi-structured depth interviews were conducted from employees at four different levels within the sales organization (sales associate, district manager, regional manager and state manager).

## **Conceptual Background**

### ***Mentoring***

Mentoring is defined and conceptualized in a number of different ways in the literature. A traditional mentoring relationship, also known as peer mentoring, is one in which a senior person in the protégé's organization assists with the protégé's personal and professional development (Thomas & Kram, 1988a; 1988b). Carmin (1988) describes mentoring as "an interactive process occurring between individuals of differing levels of experience and expertise that incorporates interpersonal or psychosocial development, career, and/or educational development, and socialization functions into the relationship."

Within a sales force, peer mentoring occurs when a more experienced salesperson takes responsibility for the development and guidance of a less experienced salesperson (Pullins, et al., 1996). Mentoring relationships can develop both formally and informally, inside and outside the focal company and the salesperson might have many mentors simultaneously (see: Higgins and Kram, 2001; Bunker, Kram and Ting, 2002), this study focuses on peer and manager mentoring. For this study, mentoring is defined as a career-oriented relationship between a more senior salesperson, mentor, and a junior or newly hired salesperson, protégé, initiated for the development of the protégé's understanding of his or her roles, the social and political nature of the organization, and the advancement of the protégé's career (Brashear, et al., 2006).

In the business literature, mentoring research is primarily conducted within human resource management (Blass & Ferris, 2007; Bozionelos & Wang, 2006; Kram & Isabella, 1985; Levenson, Van der Stede, & Cohen, 2006; Tonidandel, Avery & Phillips, 2007), however, mentoring studies have appeared within marketing education (O'Reilly, Rahinel, Foster & Patterson, 2007; Peltier, Drago & Schibrowsky, 2003) and sales (Brashear, et al., 2006; Fine & Pullins, 1998; Pullins & Fine, 2002). Researchers have provided insight into both individual-level and organizational-level factors that affect mentoring (Brashear, et al., 2006; Pullins & Fine, 2002).

### ***Salesperson Performance***

Firms spend millions per year to increase salesperson performance and to reduce salesperson turnover (Johnston & Marshall, 2011). Salesperson performance is often defined as behavior evaluated in terms of its contributions to the goals of the organization (MacKenzie, Podsakoff & Fetter, 1993). Within the literature, salesperson performance is a central construct because of its positive impact on corporate revenue (Rich, Bommer, MacKenzie, Podsakoff & Johnson, 1999), organizational commitment (Brown and Peterson, 1993), and reductions in salesperson's propensity to leave (Brown and Peterson, 1993).

In recent years, antecedents to salesperson performance have remained a central focus in many studies (Stoddard, Clopton, & Avila, 2006; Wilkinson, 2009). For example, Jones, Chonko, Rangarajan & Roberts (2006) examined role overloads in relation to salesperson performance. Jaramillo, Locander, Spector & Harris (2007) examined initiative, adaptive selling, and motivation as antecedents to salesperson objective job performance, Miao and Evans (2007) examined role perceptions and behavioral performance in relation to salesperson outcome performance, and Rutherford, Park, and Han examined perceived organizational support, emotional exhaustion, and organizational commitment as antecedents of salesperson job performance (Rutherford, Jungkun & Han 2011).

While salesperson performance is a central focus in many research studies, several meta-analyses highlight the lack of researcher's ability to develop models to predict large amounts of variance in the construct. In 1985, Churchill et al. examined role, skill, motivation, personal factors, aptitude, and organizational/environmental factors as antecedents of salesperson performance (Churchill, Ford, Hartley & Walker, 1985). In 1993, Brown and Peterson examined role ambiguity and role conflict as antecedents of salesperson performance. Homburg, Müller, & Klarmann (2011) examined salesperson adaptive selling behavior and customer orientation as antecedents of salesperson performance. Findings from all three meta-analyses suggest that the typical antecedents of salesperson performance accounted for less than 10% of the variance in salesperson performance. Hence, these studies highlight prediction issues within the current body of knowledge.

### ***Salesperson Mentoring***

There is some empirical evidence regarding mentoring and its effect on job performance in sales (Brashear, et al., 2006; Pullins, et al., 1996). Pullins, et al. (1996) examine salesperson's willingness to mentor. They find that job experience, job satisfaction, interpersonal competence, and role conflict are associated with willingness to mentor. Furthermore, they find that interpersonal competence and role conflict are also associated with a person's ability to mentor. Later, Fine and Pullins (1998) examine peer mentoring and gender. Their findings suggest that men perceive greater benefits from mentoring than women, although women tend to be more positive about mentoring, and woman/woman mentoring dyads seem to increase certain job attitudes. Later, Pullins and Fine (2002) assess how mentoring activities impact on the mentor's job outcomes and motivational levels. They find that teaching selling skills to a protégé benefits the mentor's performance and that mentoring can provide a way to develop expertise in an industry and to regenerate motivation.

Brashear et al. (2006) examine the effect of mentoring to salesperson performance. Newly hired full-time insurance salespeople from the U.S. and Canada were surveyed and the sales performance construct was measured using self-reporting by the salesperson. Findings from this study suggest that mentored salespeople perform at a higher level than non-mentored salespeople. Brashear et al. (2006) state that mentoring provides a role model for necessary skills in the sales, interpersonal, and technical areas and, ultimately, leads to high performance.

## **Methodology and Research Context**

### ***Research Design and Assessment Instrument***

The research design follows a case study approach (Yin, 2008); an approach rarely used in sales management research. This study was conducted with a large insurance carrier (later: Insurance Co.) with not only an international presence but within all fifty U.S. states as well. The Insurance Co. is consistently rated as one of the top five insurance carriers in the U.S. Nevertheless, the company's mentoring program is informal, thus no mentors are officially assigned to new sales people.

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### ***Participants of the study***

The Insurance Co. provided a list of 50 potential participants for the study. Thirty-three of the sales personnel completed the semi-structured depth interviews for a response rate of 66%. The employees represent four levels of the organization (sales associates, district managers, regional managers, and state managers) and several different locations across the U.S. The interviews of the 33 employees were conducted via telephone and by trained and experienced researchers. Each interview lasted between 60 to 75 minutes. All questions were either open-ended or semi-structured and the participants were encouraged to talk freely and openly about the topics. The interview guide contained such subjects as: prior employment history, goals for the future, training, mentoring, and support (see: Appendix 1 for the interview guide). All interviews were recorded and transcribed. Of the 33 completed interviews, six respondents were removed from the analysis because they did not indicate a mentor relationship; therefore, 27 interviews were analyzed in this study.

An outcome-based performance measure was provided by the Insurance Co. Outcome-based systems focus on results (Cravens, Ingram, LaForge & Young, 1993) using an objective quantifiable measure of performance such as sales volume or net profit (Challagalla & Tasadduq, 1996). Salespeople experience increased risk given that non-performers are not compensated (Churchill, et al., 1985). Insurance Co. sales compensation is entirely commissioned based. As such, management provided three classifications for individual sales performance: low, medium, and high performers. Specifically, the sponsoring firm evaluated the sales person's performance strictly with a number of policies they sold in a given period. Regional, district, and state managers are also evaluated on their recruitment of new sales people. Hence, this assessment of performance is managerial-based; it is not self-reported. By having Insurance Co. provide the performance evaluations, self-reporting bias is eliminated (van Bruggen, Lilien, & Kacker, 2002).

Of the 27 participants, eight are high performers, eight are medium, and the remaining eleven are low performing sales representatives. The respondents provided information pertaining to the mentoring they receive as well as the mentoring they perform. The mentors themselves were district or regional managers. The mentors are typically the person who recruited the prospective sales agent, thus having a larger stake in the agent's success. The agents joined the firm because of their admiration for their future mentor. The agent saw the mentor's relative success and wanted to emulate that success. With few exceptions, the mentor-agent relationship remained intact throughout their careers. Six of the participants were women and 21 were men. Further, seven of the respondents are sales associates. The sales associate position is the starting point at Insurance Co. Ten respondents are district managers. District manager is the first level of management and is a promotion from sales associate. These managers not only continue selling, but are also responsible for recruiting new associates. There are ten regional and state managers in our sample. Successful district managers are promoted to regional managers; regional managers are promoted to state managers. The sample includes high, medium, and low performers – as defined by Insurance Co. – for associates and each level of management. Tables 1, 2 and 3 provide a profile of the participants based on position classifications. All names provided in the manuscript have been changed to hide the identities of the participants.

**Table 1: Sales Associates Profile**

| <b>Name</b> | <b>Sales performance</b> | <b>Mentor at Insurance Co</b> | <b>Tenure at Insurance Co</b> | <b>Sales experience prior to Insurance Co.; other careers</b>         |
|-------------|--------------------------|-------------------------------|-------------------------------|---|
| Anton       | High                     | Yes                           | 3                             | 18 years sales experience outside of the insurance industry           |
| Andrew      | High                     | Yes                           | 8                             | 25 years experience in insurance industry                             |
| Alyssa      | High                     | Yes                           | 11                            | No prior sales experience   |
| Ben         | Mid                      | No                            | 6                             | Sales experience outside of the insurance industry                    |
| Celeste     | Low                      | No                            | 6                             | 10 years of sales and marketing experience outside insurance industry |
| Charlie     | Low                      | Yes                           | 5                             | Various sales jobs outside of insurance industry, military career     |
| Chris       | Low                      | No                            | 16                            | Military career   |

**Table 2: District Managers Profile**

| <b>Name</b> | <b>Sales performance</b> | <b>Mentor at Insurance Co</b> | <b>Tenure at Insurance Co</b> | <b>Work Experience before Insurance Co.</b>                                 |
|-------------|--------------------------|-------------------------------|-------------------------------|---|
| Daniel      | High                     | Yes                           | 5                             | Joined Insurance Co after graduation from college                           |
| David       | High                     | Yes                           | 11                            | Worked in retail sales for 8 years  |
| Dee         | Mid                      | Yes                           | 10                            | Worked as a loan officer  |
| Darren      | Mid                      | Yes                           | 11                            | Worked more than 20 years in the management positions in two companies      |
| Erin        | Low                      | Yes                           | 1.5                           | Customer service/sales experience in the manufacturing; 4 years in military |
| Eric        | Low                      | No                            | 8                             | 35 years of sales experience in insurance industry                          |
| Eddie       | Low                      | Yes                           | 2.5                           | Sales experience outside insurance industry; worked for the family business |
| Elena       | Low                      | Yes                           | 10                            | 25 years of experience in insurance business; worked also in manufacturing  |
| Edith       | Low                      | No                            | 8                             | Worked as an administrative assistant                                       |
| Edward      | Low                      | Yes                           | 6                             | Worked in sales +10 years   |

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**Table 3: Regional And State Managers Profile**

| <b>Name</b> | <b>Sales performance</b> | <b>Mentor at Insurance Co</b> | <b>Tenure at Insurance Co</b> | <b>Sales experience prior to Insurance Co./other careers</b> |
|-------------|--------------------------|-------------------------------|-------------------------------|--|
| Garrett     | High                     | Yes                           | 9                             | Worked as an electric engineer                               |
| Graham      | High                     | Yes                           | 16                            | Worked in social services, no prior sales experience         |
| Greg        | High                     | Yes                           | 8                             | Prior sales experience (in consumer sector)                  |
| Glenn       | Mid                      | No                            | 10                            | Worked in management positions                               |
| Gerald      | Mid                      | Yes                           | 15                            | Worked in various job such as at the oil industry            |
| Geoffrey    | Mid                      | Yes                           | Not mentioned                 | Worked as a teacher and coach at the middle school           |
| Gary        | Mid                      | Yes                           | 8                             | Various sales jobs   |
| Garrison    | Mid                      | Yes                           | Not mentioned                 | Retail sales   |
| Herman      | Low                      | Yes                           | 6                             | Worked in various sales jobs 10 years                        |
| Howard      | Low                      | Yes                           | 4                             | A number of different jobs after college                     |

There are a number of methods scholars may use to analyze qualitative data, such as key words or themes to reduce and organize data. For this study, the interviews were analyzed for themes consistent with the previous mentoring literature, and from the interview guide. Subsequently, the concepts identified were integrated and linked together, and as a result, additional themes emerged.

### **Findings and Discussion**

This study explores how mentoring influences outcome-based salesperson performance; outcome-based performance being the salesperson's output or financial results. With this knowledge in hand, selling firms will better understand what forms of mentoring will lead to increased sales performance and have a better grasp of the costs and benefits of these programs. Sales management researchers emphasize the role of mentoring in the early stage of a person's sales career (Pullins, et al., 1996). This training can help close the gap in what is actually happening and what is needed in sales force training (Pelham, 2006), thus mentoring can reduce training costs. Further, Hall and Smith (2009) suggest that mentoring may reduce the high costs associated with employee turnover, which is traditionally very high in sales. At Insurance Co., the sales associate position is the springboard to a career with the company. Success in the role leads to promotion to district manager; failure leads to churn. Accordingly, informal mentoring of sales associates is emphasized at Insurance Co. A district manager describes his first year as a sales associate: "The first year is the killer. I quit 365 times that year." Anton, a high-performing sales associate, describes the role of his first mentor as follows:

"Well, I had a gentleman back East that's my mentor and one thing that I like about the fact that Insurance Company hooks—I don't know if they do it for everyone, but I was fortunate enough for them to assign a mentor for me. So as things got a little slow or they got difficult for me, I had

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someone that was able to coach me through that process because they had gone through it as well. So I mean I actually have a mentor within the Insurance Company system specifically assigned to me by them”.

This employee worked for one of a few districts at the Insurance Company which assigned mentors to new Sales Associates. At Insurance Company, mentoring relationships begin informally; the company does not sanction or reward mentors or mentees. Mentoring is a part of the culture rather than a formal procedure. Danny, currently a district manager, describes his situation as young Sales Associate: “He [the state sales coordinator] was a great mentor of mine, and he and I have spent a lot of time talking about business, and philosophies and things that we can do to make our business better.” Garrett, a regional manager, describes the relationship with his mentor: “He invested in me. I mean, he was willing to take time with me to better my career. Number one, I was a good student. He says that. But he was a good teacher.” Erin, a district manager, emphasized her mentor’s role when she was a new Sales Associate:

“I was actually at the point where I was ready to decide this was not going to be for me. And she actually believed in me when I didn’t and she took the extra time to sit down with me, go over things that I was having particular problems with, things that I was—I thought I was doing wrong where she showed me I really wasn’t doing them wrong. It’s just that I wasn’t projecting the proper amount of confidence and believed in the product itself. And once we got that turned around and she showed me where my shortcomings were on that, I haven’t looked back.”

Sales associates with a mentor relationship appear to perform better – not only in the short term, but over the course of their careers. All of the study’s high performing sales associates have mentors whereas only one low performing associate does. None of the mid-performing sales associates have mentors at Insurance Company. Furthermore, the district managers, regardless of their indicated current level of performance (they cannot be promoted if their sales performance is not adequate), have had mentors as sales associates and continue to have mentors at this point in their career.

Depending on their level of performance, sales associates have different views of Insurance Co. regarding training. For instance, those without mentors feel that they are disconnected from the corporate office and bemoan the lack of training and sales support. Chris, a low performing sales associate without a mentor, states:

“I haven’t been given anything since I’ve been there. It’s been strictly my own stuff, so I think it gives them the favorites, and different reasons. I’ve never gotten anything from corporate.”

Insurance Company provides in-class and online instruction, but many salespeople view that they receive more guidance from their mentors than from training sessions. Mentoring appears to provide more individualized coaching for salespeople, resulting in better sales performance. Darren, a mid-range performing district manager, explains: “We have a couple of classroom-type things that are helpful to district managers, but I think that the age-old thing of having someone that you can go to, a mentor, that helps you through those things, are just as important as the classroom setting.” Glenn, a mid-range performing regional manager, offers that his mentor contributed the most to his success, more than any training he received. “It’s all about experience”, he concludes. Thus, sales training rooted in experience has greater impact on the development of sales people. These sales people note that having a mentor place the formal sales training into an experiential context results in better comprehension and future performance.

Many mentoring relationships start in the beginning of the career at Insurance Company and some of these relationships last past promotion into management. For example, one of the district managers said that he still talks with his mentor weekly. In addition, managers would like to have a mentor throughout their career at Insurance Company. Garrett, regional manager, explains:

“[Name] state manager, outside of my father, has probably been one of the biggest mentors. He was my SSC (state sales coordinator) when I stepped up to regional manager. -- The systems that he gave me; he gave me a communication system, which was tremendous. It’s basically, if you saw them you’d call them a report that I use to help manage my associates. That was, system-wise, one of the most influential and helpful things he gave me to understand what my team was doing.”

One of the high performing sales associates, Annie, views those who work with her closely as her mentors:

“My husband is my mentor. We work together – we worked every day together. We bounce ideas off of each other. There’s been people – other associates that have been with Insurance Company for a long time that you draw from, you learn from, and there’s been several of those.”

As is typical of most in the sales profession, there are times when self-doubt develops. “Is this the career for me?”, “do I have what it takes to succeed?” and so forth. Sales agents with a strong mentor relationship have found someone to coach them through the doubts. Srivastava (2011) found that strong engagement with a mentor can decrease sales staff turnover by 87%. The discussions with these sales representatives do not dissuade from Srivastava’s findings.

### ***The transition from protégé to mentor***

Previous research found that mentoring also has a positive effect on the mentor’s career (Pullins & Fine, 2002). Successful managers take on the role as coaches and mentors for their new sales associates, with whom they frequently recruit and work. They view their role of mentor and coach has led to their sales associates’ successful careers. Thus, it is vital that managers be good coaches and mentors. One of the state managers, Garrison expresses: “The people are the biggest asset. When it comes to training, it’s the people not the process.” Glenn, a regional manager, contends that mentoring is vital to a new sales associate:

“The mentors that have been helpful to me have been the high producers that show through their actions that they’re very productive. ----- There’s people in this organization that are highly ethical, highly motivated to succeed, concentrate on ministry in the sense of serving their clients with the best product and the protection that Insurance Company will give them. Those are the people that I have really benefited from and been motivated by. And that’s the kind of mentoring and the modeling that I want to project to our associates. And that’s not just money and sales. It’s actually ministry in the sense that we’re helping people help themselves when something happens to them...”

Mentoring and interacting with new sales associates is viewed as a success factor for district managers. David, a high performing district manager, emphasizes teamwork when asked who would be a good district manager:

“... I think it has to be someone that has shown that they like working with the other associates that they have around them. The ones that I’ve seen that haven’t been successful are the ones that

want to be isolated, don't want to interact with their fellow associates when they are associates, and they have problems when paths cross and all that type of stuff.”

The career progression for sales professionals within Insurance Co. is Sales Associate, District Manager, Region Manager and, ultimately, State Manager. As sales associates move into management, their ability to mentor others is of increasing importance. Through the discussions with the twenty managers with whom we spoke (see tables 2 & 3), we found that those who had strong relationships with mentors are more likely to become mentors to others. While all managers claimed that they currently mentor others, our analysis of the discussions suggest that only eleven of the managers are truly mentoring others within Insurance Co. as defined by Carmin (1988). Furthermore, none of these eleven managers are described as low performers.

### **Conclusions and Managerial Implications**

This study demonstrates the importance of mentoring sales representatives and is a step forward in improving the understanding of how and why mentoring improves salesperson performance. Data was collected with semi-structured interviews from 27 salespeople from different levels at the international insurance company. The findings highlight the role of mentoring in the beginning of a career; successful salespeople are mentored early on in their career at the Insurance Company. From table 1, we see that all three high performing sales associates are mentored, while only one of the remaining sales associates have a mentor. Additionally, mentoring plays an important role in reducing turnover and increasing job satisfaction early in one's sales career, in particular for companies that evaluate their sales people with outcome-based performance measures.

The study focuses on informal mentoring, which may have a different impact on mentees than formal mentoring. The findings suggest that for mentoring to be successful, it requires investments from parties, mentor and protégé. In an informal mentoring environment or culture, both parties, mentor and protégé, may be more willing to invest in the relationship and to terminate an unsuccessful relationship than in a formal mentoring program.

This study has limitations. Only salespeople in one company of one industry are examined. The context of our study, the insurance industry and the company's structure of the sales force might have influenced the findings. In addition, the focus is on informal mentoring. To overcome some of these limitations, the following suggestions for future research may be useful. Further research can investigate which type of mentoring, informal and formal, has the greater impact on salesperson turnover. Also, research may look outside of the sales arena to consider the effects of mentoring. Perhaps, professions that are less supervised, such as sales, are more sensitive to the influence of mentoring. Moreover, in comparing informal and formal mentoring, studies may consider the likelihood that one or the other may be more stable over time. Other research could examine firms across industries and salespeople from different types of sales organizations. It would also be interesting to compare mentoring in different countries and cultural contexts.

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**Minna Rollins** (D.Sc. in Econ & Bus.Adm. University of Turku) is Associate Professor of Marketing at the University of West Georgia and Visiting Professor of International Business and Sales Management in University of Eastern Finland, Kuopio. Her research interests include in customer information usage, sales management, and international marketing. Minna teaches undergraduate, graduate, and doctoral level courses. She has published in the journals *Industrial Marketing Management*, the *Journal of Business Research*, *International Journal of Physical Distribution and Logistics Management*, and *Journal of Business and Industrial Marketing*.

**Brian N. Rutherford** (Ph.D., Georgia State University), Assistant Professor of Marketing and Professional Sales, Kennesaw State University. He serves as the Marketing coordinator for Kennesaw's doctoral program. He has forty journal publications including articles in the *Journal of Business Research*, *Journal of Personal Selling and Sales Management*, *Industrial Marketing Management*, and the *Journal of Business and Industrial Marketing*.

**David Nickell** (Ph.D., Georgia State University) is an Assistant Professor of Marketing in the Richards College of Business at University of West Georgia. Dr Nickell's research interests include Sponsorship-Linked Marketing, Marketing Metrics, and B2B Marketing. He has published in several international conference proceedings and in the *Journal of Business Research*, *Industrial Marketing Management*, and the *Journal of Business and Industrial Marketing*.

## Appendix 1 Interview Guide

| Theme  | Questions   |
|--|---|
| <b>About participant</b>   | <ul style="list-style-type: none"> <li>• Current status at insurance Co.</li> <li>• Where you grew up</li> <li>• Family</li> <li>• School / college               <ul style="list-style-type: none"> <li>○ Classes you liked most / why</li> <li>○ Teachers you liked most / why</li> </ul> </li> <li>• What you wanted to do / be when you grew up</li> <li>• Your family today (spouse / kids / grandkids)</li> <li>• Neighborhood you live in</li> <li>• Things you / your family do when you're not working</li> <li>• Things that would happen on your perfect day (off)</li> </ul>  |
| <b>Your career (before joining Insurance Co.)</b>                              | <ul style="list-style-type: none"> <li>• Tell me about your career / job history: types of works you enjoyed most / least, specific things you liked to do most / least</li> <li>• Goals for the future: goals for next 10 years and how those goals have changed over time</li> </ul>  |
| <b>Think back to your earliest memories and experiences with Insurance Co.</b> | <ul style="list-style-type: none"> <li>• How did you become aware of the company?</li> <li>• Reasons for even considering it?</li> <li>• Other things / opportunities you were considering at the same time?</li> <li>• All the steps in the process from awareness to the decision.</li> <li>• The single most influential:               <ul style="list-style-type: none"> <li>○ Person in the process</li> <li>○ Piece of information about Insurance Co.</li> <li>○ Benefit or perk</li> </ul> </li> <li>• If you had it all to do over again, things would you change about your process of investigating / evaluating Insurance Co.</li> </ul> |
| <b>Succeeding at Insurance Co.</b>   | <p>What has been most / least valuable and most / least rewarding along the way for each of the following:</p> <ul style="list-style-type: none"> <li>• Training</li> <li>• Mentors you have had</li> <li>• Support from field management</li> <li>• Support from corporate management</li> <li>• Support from sales support / administration at corporate</li> <li>• Promotions / awards</li> <li>• The person or thing that has been your greatest inspiration at Insurance Co.</li> </ul>  |
| <b>Tell me about your plan or guidelines for success</b>                       | <ul style="list-style-type: none"> <li>• Goals</li> <li>• Managing your business from an operational standpoint:               <ul style="list-style-type: none"> <li>○ Things you do/require/say/deliver/do differently / better (compare to those things an unsuccessful individual does)</li> </ul> </li> </ul>  |
| <b>What's an ideal working day like for you</b>                                | <ul style="list-style-type: none"> <li>• Things that do / don't happen</li> <li>• Type of people you get to deal with</li> <li>• Things you accomplish / set in motion</li> <li>• Types of interaction you have</li> <li>• In office / in the field / on-site</li> <li>• With the payroll account vs. the employee</li> </ul>   |

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|  |   |
|--|---|
| <b>Reasons people like you and want to give you their business</b> | <ul style="list-style-type: none"> <li>• Your approach – things you say / do</li> <li>• Your style – the way you say / do things</li> <li>• Your personality – things people like, enjoy</li> <li>• Ways you are different than others who do what you do but don't do it as well</li> </ul>  |
| <b>Recruiting process</b>  | <ul style="list-style-type: none"> <li>• What makes it successful and what are the drawbacks?</li> <li>• Minority recruiting – thoughts on efforts to date; how could it be improved?</li> <li>• Using recruiting as a model for growth – thoughts?</li> </ul>  |
| <b>Only for district and regional managers</b>                     | <ul style="list-style-type: none"> <li>• Describe the best background and / or training for someone who has to step into the role of district/regional manager.</li> <li>• Describe your management style and what about it you believe is most effective in building your team</li> <li>• Fill in the blanks:<br/>The ideal training program to be a successful at Insurance Co. would include _____<br/>The ideal personality for a successful career _____<br/>To be successful at Insurance Co you have to:<br/>Be _____<br/>Have had _____<br/>Know _____<br/>Do _____<br/>Understand _____</li> </ul> |

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