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Salesperson attributes that influence consumer perceptions of sales interactions

Maria Petrescu
petrescm@erau.edu

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Salesperson Attributes that Influence Consumer Perceptions of Sales Interactions

Abstract

This research examines how modern, digital era consumers prioritize salesperson customer orientation attributes when evaluating their expectations regarding interactions with salespeople, as well as their impact on positive and negative word-of-mouth. The differential function of the shopping environment on these attributes is also explored. Role theory and expectancy-disconfirmation theory form the theoretical foundation for two mixed-method studies. Study 1 is an exploratory content analysis of online consumer reviews and social media word-of-mouth related to consumer experiences with salespeople. Study 2 is a three-round Delphi study that investigates which salesperson orientation attributes are most important to consumers. The results uncover not only which salesperson customer orientation attributes are essential for modern consumers, but also how they differ as a function of context (retail, direct-selling, service failure) and how they contribute to the generation of digital word-of-mouth. In addition, the research also investigates which negative salesperson attributes have an impact on overall customer experience and satisfaction.

Keywords: salesperson attributes, salesperson customer orientation, role theory, expectancy-disconfirmation theory, word-of-mouth, Delphi study, mixed methods

Introduction

The omnichannel presence of many companies has called into question the continued importance or necessity of the salesperson due to increased product information availability (Fergurson 2020). While consumers of the past possessed relatively little knowledge about products, today's customers are accustomed to doing their research and arming themselves with a wealth of information. As product information becomes more readily available to consumers, pricing becomes more competitive, and omnichannel marketing makes products more accessible, the importance of high-quality interactions with salespeople becomes more vital in gaining and maintaining a competitive advantage in the traditional and online environment (Cross et al. 2007; Cuevas 2018; Hoyle, Dingus, and Wilson 2020; Marshall et al. 2012). According to Mobee CEO Hal Charnley, "sales associates are, arguably, the most strategic competitive advantage that a retailer has" (McGregor 2016, 1).

In a recent *Journal of Retailing* special issue on multi-channel retailing, Verhoef, Kannan, and Inman stated, "retailing has changed dramatically in the last two decades due to the advent of the online channel and ongoing digitalization" (2015). The integration of mobile shopping into the brick-and-mortar store experience also blurs the line between online and offline shopping. Mobile devices affect how consumers negotiate retail environments and manage shopping tasks (Shankar et al. 2010). Mobile channels have resulted in a disruptive change in the retailing environment (Rigby 2011). While many customers obtain large amounts of product information before entering a brick-and-mortar store, many settings such as high-end retail outlets and complex purchase categories, i.e., appliances, automotive, and home furnishings are where "consumers still expect to be waited on by salespeople – and derive a lot of value out of the traditional sales associate interaction" (Yohn 2014). These interactions enable the salesperson to clarify conflicting information that the customer may find and improve a customer's product expectations. The majority of customer interface

occurs between the salesperson and the customer, and the firm entrusts front-line responsibility to sales representatives (Boles, Barksdale, and Johnson 1997; Zoltners, Sinha, and Lorimer 2011).

Furthermore, as brick-and-mortar retailers are also facing increased pressure in the form of online competitors and online reviews, high-quality salespeople are starting to play a new role in the digital era and can serve as a way for these retailers to differentiate among one another as well as set themselves apart from online competitors (Cross et al. 2007; Cuevas 2018; Hoyle, Dingus, and Wilson 2020; Marshall et al. 2012). "As a conduit for communicating information, building rapport, gleaning customer insights, and helping customers uncover unfelt or latent needs, retail salespeople remain an indispensable force in building customer relationships with stores, products, and brands" (Fergurson 2020, 2). Through this buyer-seller interaction, salespeople influence the feelings, decision-making process, and satisfaction of customers. Customer satisfaction depends on how well the salesperson interaction matches customer expectations; however, as the modern consumer is much more informed and educated consumption-wise than in the past, this increases the expectations and demand from the sales interaction (Cross et al. 2007; Cuevas 2018; Habel et al. 2020; Rippé et al. 2016). In this context, salespeople's customer orientation becomes essential in maintaining customer loyalty and achieving customer satisfaction both in a retail context (Goff et al. 1997; Homburg, Müller, and Klarmann 2011a, b; Lee and Dubinsky 2003), as well as in a direct-selling environment (Dobrescu and Radu 2014; Raymond and Tanner 1994). Moreover, the current digitally-oriented shopping environment places the focus not only on customer satisfaction but also on the importance of word-of-mouth as an outcome of satisfaction and antecedent of loyalty and additional sales (Reynolds and Arnold 2000; Tuk et al. 2009).

Existing literature has examined the importance that consumers place on retail salesperson characteristics (Hawes, Rao, and Baker 1993; Lee and Dubinsky 2003) and the effects of salesperson attributes on satisfaction and patronage intentions (Grewal and Sharma 1991; Humphreys and Williams 1996). Salesperson attributes such as a salesperson's helpfulness, friendliness, responsiveness, expertise, knowledge of the firm's products, and ability to answer questions may come into play when determining customer satisfaction as well as subsequent word-of-mouth (Darian, Tucci, and Wiman 2001; Humphreys and Williams 1996; Reynolds and Arnold 2000; Tuk et al. 2009). "The role of the retail salesperson has shifted, and retailers have been left without a clear understanding of how to manage this change in the retailing landscape" (Rapp et al. 2015, 358). This changing role set forces industry and academia to re-evaluate the varying attributes associated with salespeople and their importance in influencing customer expectations during the buying process in the digital era along with the critical elements of customer orientation essential for a salesperson that leads not only to closing the sale but also to positive digital word-of-mouth (Cuevas 2018; Habel et al. 2020; Homburg, Müller, and Klarmann 2011a, b; Marshall et al. 2012). Furthermore, these elements may differ as a function of the context (retail, direct-selling, service failure) of the salesperson-buyer interaction. Thus, a better understanding of consumer expectations regarding salesperson-customer orientation behavior is beneficial in expanding the connection between salespeople and consumer behavior for academic researchers as well as providing strategic implications for retail and direct-selling management.

This manuscript's objective is to assess how consumers prioritize salesperson customer orientation attributes when evaluating their sales interaction experience and in the formulation of digital word-of-mouth about their purchase experience and how these attributes may differ as a function of the shopping environment. It contributes to the sales and

marketing literature by uncovering the essential salesperson customer orientation attributes in the digital era and how they differ as a function of context (retail, direct-selling, service failure) and how they lead to the creation of word-of-mouth. This research also clarifies which negative aspects can have an impact on overall customer experience and digital word-of-mouth.

The theoretical frameworks of Role Theory, with a focus on the relational and functional customer orientation model of Homburg, Müller, and Klarmann (2011a), as well as Expectancy-Disconfirmation Theory (Oliver 1977) with a focus on discovering consumers' expectations regarding the type and components of customer orientation exhibited by the salesperson serve as the foundation of this paper. Retail workers represent the most significant employment group, accounting for almost six percent of the total U.S. workforce, according to the U.S. Bureau of Labor Statistics (2017). Given these employment numbers, we focus our analysis of salespeople in a relatively broad term, including individuals who work in retail stores, who sell products and services, and who advise purchases in a direct-selling environment, supply consumers with information, or assist customers on the floors of retail stores. The overarching goal of this research is two-fold:

1)   Determine the salesperson customer orientation types and attributes that consumers believe are most important in salesperson-consumer interactions in the retail and direct-selling settings, as well as in service failure follow-up;

2)   Develop an understanding of how these attributes impact feelings of satisfaction/dissatisfaction, and which attributes are the most negative salesperson characteristics that affect relationship building and digital word-of-mouth following a sales experience.

The remainder of this paper is organized as follows: First, a discussion of relevant literature related to role theory, expectancy-disconfirmation theory, and salesperson customer

orientation is presented. Second, the results of two conceptual mapping qualitative analysis studies that examine the salesperson characteristics that consumers deem most important in evaluating their retail experience are discussed. Third, the attributes revealed in the qualitative analyses are further explored and presented in the results of a three-round quantitative Delphi study. Finally, the manuscript concludes by discussing the implications for sales and marketing scholars and practitioners and directions for future research.

Literature Review

Role theory and customer orientation

According to Role Theory, individuals behave in a particular manner dependent on the specific role assigned to the situation, and an individual may play multiple roles simultaneously or successively. As noted by Solomon et al., "role theory is based on a dramaturgical metaphor" (1985, 102). Goffman (1959) built the dramaturgical theory on the overall concept of the encounter between individuals. In examining encounters, Goffman (1959) posited the way people validate identities during face-to-face meetings and established a framework to evaluate the meanings of encounters. A primary source of this evaluation is the information a person conveys through expressions (Vieira da Cunha 2013). In buyer-seller interactions, salespeople take on various roles, and these roles represent shared expectations with the customer about how individuals should behave in specific circumstances (Grayson 2007; Heide and Wathne 2006; Homburg, Müller, and Klarmann 2011a). The customer then forms an evaluation of the communication, (i.e., customer satisfaction).

In the context of salesperson behavior, studies have shown that customer-oriented behaviors can have negative consequences if they do not fit consumers' expectations or in the case of significant role conflicts, leading to dissatisfaction and negative word-of-mouth (Agnihotri et al. 2017; Alavi et al. 2018; Homburg, Müller, and Klarmann 2011a; Tuk et al.

2009). Role clarity is essential in salesperson attitudes and behavior, as well as in obtaining buyer satisfaction and subsequent positive word-of-mouth (Michel, Merk, Eroglu 2015; Reynolds and Arnold 2000; Tuk et al. 2009). These findings make it necessary to establish the exact consumer expectations regarding customer-oriented behaviors in different sales circumstances to ensure customer satisfaction.

Customer orientation is defined as a combination of behaviors that exhibit a high level of regard for customers' interests, needs, and long-term satisfaction (Franke and Park 2006; Homburg, Müller, and Klarmann 2011a; Pettijohn, Pettijohn, and Taylor 2002; Stock and Hoyer 2005). In a sales context, customer orientation refers to focusing on the selling task, trying to help customers make purchase decisions that will satisfy their needs (Gerlach et al. 2016; Habel et al. 2020; Marshall et al. 2012; Saxe and Weitz 1982; Terho et al. 2015). This type of sales orientation focuses on avoiding customer dissatisfaction and increasing the possibility of long-term relationships, including, if needed, avoiding actions that sacrifice customer interest to increase the probability of making an immediate sale (Franke and Park 2006; Saxe and Weitz 1982). The classical customer orientation in selling just discussed has been defined as functional customer orientation. Functional customer orientation is considered task-oriented, limited to consumer expectations related to the salesperson's role as a businessperson (Homburg, Müller, and Klarmann 2011b). In this context, role expectations for salespersons emphasize extrinsic motivations, the identification of customer needs, or customization of products (Heide and Wathne 2006; Homburg, Müller, and Klarmann 2011b). This definition is distinct from relational customer orientation, representing a set of behaviors meant to establish a personal relationship with the customer (Homburg, Müller, and Klarmann 2011a). On the other end of the spectrum, relational customer orientation includes behavior focused at creating a personal relationship with the customer, the social side of the interaction and sees the salesperson like a friend, rather than a businessperson

(Grayson 2007; Heide and Wathne 2006; Homburg, Müller, and Klarmann 2011b; Yim et al. 2008). Regarding relational expectations, consumers emphasize roles related to intrinsic motives, social aspects, friend-like behavior (Crosby, Evans, and Cowles 1990; Grayson 2007; Heide and Wathne 2006; Homburg, Müller, and Klarmann 2011a). While these categories of customer orientation are distinct, they are complementary sides of customer orientation behavior in sales (Bateman and Valentine 2015; Homburg, Müller, and Klarmann 2011a).

This study focuses on consumer expectations regarding salesperson customer orientation style in various sales services circumstances, such as retail, direct-selling, or service failure settings. The study will examine both the functional and relational sides of customer orientation to uncover the combination of salesperson attributes from both orientations that are deemed most important by consumers.

Consumer expectations of salespeople customer orientation

Expectancy-Disconfirmation Theory (Oliver 1977) serves as a theoretical lens to build a conceptual framework for examining how consumers' expectations regarding salesperson attributes impact the disconfirmation of consumers' beliefs and post-purchase satisfaction/dissatisfaction. Expectancy-disconfirmation theory posits that expectations, perceived performance, and disconfirmation of beliefs affect satisfaction/dissatisfaction (Mill 2002). Expectations represent a consumer's preconceived notions of how the interaction with an entity, in this case, a salesperson interaction, will take place. Perceived performance denotes an individual's perceptions regarding the level of quality of an entity's actions, which in this case would be the quality of their interaction with a salesperson. Disconfirmation represents whether there is a difference or not between an individual's preconceived expectations and perceived performance. Therefore, in this case, disconfirmation would be if

a consumer's perceived performance of an interaction with a salesperson did not meet their prior expectations.

In this context, the way consumers perceive a salesperson and their interaction in the sales process is significant in the consumption decision-making progression. Attitudes towards the salesperson are defined as consumer evaluative reactions and predispositions to respond positively or negatively to a salesperson (Brown, Cron, and Slocum, Jr 1998). Consumer satisfaction with a salesperson influences the overall attitude with the retail store and the product, as well as consumers' intentions of a repurchase (Clopton, Stoddard, and Clay 2001). Under these circumstances, studies have shown that consumers' needs and expectations, as well as how salespeople anticipate the prospect's predisposition, affect the outcome of the sales process (Lee and Lim 2010).

Existing research on important salesperson attributes also examines the effect of the classical "Big Five" personality characteristics: openness to experience, conscientiousness, extraversion, agreeableness, and neuroticism as they relate to employees in the sales department (Furnham and Fudge 2008) while also focusing on other sales effectiveness traits such as persuasiveness, tact, and competitiveness (Brown, Cron, and Slocum, Jr. 2006). Other studies include the concept of aggressiveness as well, especially in an American context, while in the circumstance of ethical, successful behavior, the importance of confidence has been underlined (Schwepker 1999).

The marketing research has also emphasized two salesperson attributes that influence consumer behavior and intervene in the customer complaint process, namely the salesperson's willingness to listen to the customers' complaints and the salesperson's product-related knowledge (Clopton, Stoddard, and Clay 2001; Pettijohn, Pettijohn, and Taylor 2002). Willingness to listen refers to a salesperson's degree of attentiveness and interest in customer feedback. At the same time, product-related knowledge includes being familiar with the

product or service, understanding of customer needs and expectations, as well as their complaint motivations (Clopton, Stoddard, and Clay 2001). Moreover, ethics, honest answers to questions, and refraining from leading customers, are essential attributes of salespeople (Schwepker 1999; Tadepalli 1995). In the modern digital economy, salespersons are also technology-savvy and potential providers of consumer solutions in a customer-oriented framework (Cuevas 2018; Panagopoulos, Rapp, and Ogilvie 2017).

Research regarding relational customer orientation in sales shows that the salesperson's ability to reduce perceived uncertainty is essential, creating mutual disclosure, helping the customer rely on the salesperson's integrity, and have confidence and trust in the salesperson's future performance (Crosby, Evans, and Cowles 1990; Donavan, Brown, and Mowen 2004; Lee and Dubinsky 2003). Regarding service failure and negative sales situations, an essential part in the sales management process, studies have shown that a party engaging in unreciprocated disclosure is likely to distrust the other party, especially when the salesperson needs to solve complex and ill-structured problems (Crosby, Evans, and Cowles 1990; Dubinsky 1981). Salespeople need to be able to reassure customers, manage the follow-up phase, and handle complaints if the product or service does not meet customer's expectations (Amyx and Bhuian 2009; Dubinsky 1981). Previous research found that salesperson-customer orientation influences how buyers respond to service transgressions and contributes to consumer satisfaction/dissatisfaction in the recovery process (Hansen, Lund, and DeCarlo 2016).

In this context, it is also essential to consider that word-of-mouth can have a higher impact than personal selling on information dissemination, consumer buying behavior, and a significant influence in the diffusion of new products (Keller 2007; Villanueva 2008). As word-of-mouth can be either positive or negative, customer complaining behavior resulting from a negative interaction with a salesperson can negatively affect the probability of further

purchase and long-term loyalty (Derbaix and Vanhamme 2003; Romaniuk 2007). Word-of-mouth is a pivotal aspect in the modern electronic media, such as e-mail, blogs, and social media and is perceived as a reliable source of information, affecting the overall value of a firm's offering (Gruen, Osmonbekov and Czaplewski 2006; Petrescu et al. 2018, 2019; Smith, Coyle, Lightfoot and Scott 2007). Moreover, this aspect is even more important in a direct-selling context, considering that information sharing is more dominant among negative WOM behaviors, as a form of customer complaining behavior (Bach and Kim, 2012; Petrescu et al. 2019; Romaniuk, 2007).

Considering Role Theory and Expectancy-Disconfirmation Theory, the objectives in this paper are to evaluate consumer expectations regarding the most important dimensions of customer orientation in the selling process. It is necessary to assess the differences in expectations as a function of the sales environment and see the possible distinctions between the sales experience in a retail setting and a direct-selling context. Finally, an analysis of the most significant negative dimensions perceived by consumers in their interactions with a sales agent sheds light on attributes that may reduce the effectiveness of customer orientation, lead to service failures, the formulation of negative word-of-mouth, and prevent the formation of long-term relationships. Therefore, this research will seek to examine the following research questions:

RQ1: What are modern consumer expectations regarding salesperson customer orientation and attributes in retail and direct-selling that generate digital word-of-mouth?

RQ2: What are the negative dimensions or customer interactions that can lead to service failure and negative word-of-mouth?

Methodology

This paper follows a mixed-methods approach to integrate findings and draw conclusions from qualitative and quantitative data to fully understand consumer expectations regarding salesperson customer orientation and their word-of-mouth behavior (Johnson 2015a, b). This mixed-method methodology allows the researcher to enhance the validity of quantitative research concepts and inquiries by grounding them in real-life situations (Padgett 1998; Rowan and Wulff 2007). The objective of the analysis is to identify salesperson attributes that are important in consumer evaluation of their retail experience and impact consumer propensity to engage in digital word-of-mouth.

Study 1: A qualitative analysis of digital word-of-mouth

The first study focuses on an exploratory conceptual mapping qualitative analysis method of digital word-of-mouth posted by consumers following their experience with a salesperson. The data used in the two qualitative analyses in Study 1 first includes online consumer reviews on Google Maps and consumer comments posted on social media, including the Facebook profile of the brands of interest. The following sections provide more details about the data and methodology employed.

Study 1a: Online consumer reviews

The researchers first downloaded online consumer reviews that include their experience with salespersons in four retail stores in the U.S. that still use salespersons directly involved in the stores' sales and retail process: Helzberg Diamonds, Macy's, Conn's Furniture, and Best Buy. The dataset included 1,900 consumer reviews posted on Google Maps for over 100 retail locations across the United States. Consumer reviews have been included among the most popular word-of-mouth content analyzed by marketing researchers but have not been a significant focus when it comes to their relationship with salespersons

attributes and customer orientation and with consumer expectancy disconfirmation (Casaló et al. 2015; Kostyra et al. 2016; Moon and Kamakura 2017; Petrescu et al. 2018).

To analyze the text of the reviews, the researchers performed a lexical co-occurrence content analysis using Leximancer, a relatively new method for transforming lexical co-occurrence information from natural language into semantic patterns in an unsupervised manner (Dann 2010; Smith and Humphreys 2006). The researchers then created a conceptual map of the review text based on Leximancer's deep learning procedure that extracts a three-level network model of meaning from the data to discover critical themes and their relationships with each other (Krishen et al. 2014; Krishen, Berezan, & Raab 2019; Petrescu et al. 2019).

In the results in Figure 1, semantically related themes are shown as large shaded circles and represent higher-order clusters of semantically connected groups of concepts. The essential concepts are represented as small shaded circles or nodes, while their size is based on the prominence of the concepts relative to other ones (Krishen et al. 2014; Krishen, Berezan, and Raab 2019; Smith 2007; Smith and Humphreys 2006). The lines connecting the concepts indicate the semantic proximity of the concepts, which we also included in Table 1. The prominence score (the joint probability divided by the product of the marginal probabilities) is included for the most important items in the model, showing where a score of > 1.0 indicates that the co-occurrence happens more often than chance (Smith, 2007; Smith and Humphreys, 2006).

Please Insert Figure 1 About Here

The objective of the analysis is to identify dimensions in the interaction with salespersons that are important in consumer evaluation of their retail experience and have an

impact on consumer digital word-of-mouth and their likelihood of writing online reviews. Some of the themes discovered in the conceptual mapping analysis correspond to previous studies and emphasize the importance that consumers place on salespeople being helpful and knowledgeable regarding the company they represent. In Figure 1, the themes of being a friendly and kind person stand out, underlining the importance of salespeople not only to solve problems (functional customer orientation) but also to communicate in a friendly manner with their customers (relational customer orientation). Despite consumer tendency to focus on posting negative word-of-mouth as a result of negative experiences (Bach and Kim 2012; Petrescu et al. 2019; Romaniuk 2007), the reviews included on Google Maps tend to focus on positive aspects that consumers appreciate and expect in their interaction with salespersons. As shown in Table 1, consumers expressed their expectations regarding the method of communication and treatment received by placing a significant emphasis in their reviews on service, employee care (helpfulness, need fulfillment, friendliness), and the overall experience they received.

Please Insert Table 1 About Here

Study 1b: Social media comments

The second part of this study performed another lexical co-occurrence content analysis and compared expectations regarding salesperson customer orientation mentioned by consumers in a retail setting, versus experiences in a direct-selling context by using social media data. For the second analysis, the researchers downloaded consumer comments from Facebook for five retail-type companies: Helzberg (410), Macy's (466), Conn's (98), Verizon (592), and Best Buy (1036). For direct-selling brands, the downloaded comments related to sales experiences from Cutco (342), Avon (140), Mary Kay (135), Melaleuca (137), Amway

(160), Herbalife (37), and Young Living (116). The posts retained for analysis referred to consumer experiences with a salesperson, representative, agent, associate, consultant, or independent business owner (IBO). The authors analyzed 2,602 comments for retail experiences and 1,067 posts related to dealing with a direct-selling consultant.

Figure 2 and Table 2 show the results of the conceptual mapping content analysis we performed in Leximancer. The researchers compared the main keywords and themes discussed by consumers after a retail interaction with those mentioned after the contact with a direct-selling representative. Table 2 presents the prominence index of various concepts for the two environments. As the results show, the experience with a direct-selling context shows that local contacts, the personal interaction with the salesperson, and even emotional aspects are essential, emphasizing the importance of the relational side of customer orientation. Moreover, the product and its quality are mentioned more often in this regard, which shows an interest in the functional aspect. In contrast, consumers writing about their retail experience talk more about the experiential (relational) side of the purchase, service, care, and other attentions they receive.

Please Insert Figure 2 About Here

Please Insert Table 2 About Here

In the context of this type of word-of-mouth, we also encounter aspects related to negative experiences and service failure, as emphasized by consumer references to situations in which they returned products, received the wrong information or the incorrect price, and the service took too long. The presence of negative word-of-mouth is much more significant

in social media comments than in the previously analyzed online reviews. It emphasizes the presence of expectancy disconfirmation and role confusion.

Considering that consumers mentioned important aspects both from the functional and relational sides of salesperson customer orientation, the researchers next focus was on analyzing consumer expectations regarding the best combination of elements from these two dimensions (Homburg, Müller, and Klarmann 2011a). The purpose is to establish which aspects from both dimensions are important and how they differ as a function of context (retail, direct-selling, or service failure) and which negative aspects can impact the overall customer experience and satisfaction.

Study 2: Delphi analysis of consumer expectations

The salesperson attributes revealed in the exploratory qualitative analysis (Study 1) are further explored with a different method of data collection and analysis to examine the critical salesperson orientation dimensions vital for consumers (Johnson 2015; Michel, Merk, and Eroglu 2015). It is necessary to first organize the key functional and relational dimensions discussed in previous literature that could be of interest to this study. Those are presented in Table 3. Then, we used the key dimensions discovered in Study 1 and the attributes used by previous literature presented in Table 3 to formulate a list of characteristics for further analyses.

Please Insert Table 3 About Here

Researchers then performed a three-round Delphi study on a national sample of consumers. The purpose of the study is to develop a better understanding of how consumers reflect on their expectations regarding salesperson interactions and which aspects determine expectancy disconfirmation and service failure situations. The researchers also analyzed

which salesperson orientation attributes are a priority in a brick-and-mortar retail environment vs. a direct-selling setting, considering the changes brought by the digital economy, social media, and personalization era (Hoyle, Dingus, and Wilson 2020; Marshall et al. 2012).

The Delphi method is widely used to deal with complex problems, forecasting, and to reach a consensus in different areas, from medical research to business practice and industries that are changing rapidly (Kaynak, Bloom, and Leibold 1994; Mitchell and McGoldrick 1994; Yeoh 2019). Some of its advantages are anonymity, controlled feedback, and statistical group response (Bradley and Stewart 2003; Rowe and Wright 1999). Delphi is a hybrid forecasting method based on building consensus among a group of respondents and has been used in marketing to identify product and consumer attitudes towards innovative products (Bonnemaizon, Cova, and Louyot 2007).

As researchers recommend various optimal sample sizes for a Delphi study, our initial sample size included a convenience sample of 54 consumers familiar with both traditional retail and direct-selling environments from across the U.S., estimating that we will reach an attrition level by the final round of about 90% (Bradley and Stewart 2003; Mitchell and McGoldrick 1994; Prendergast and Marr 1994). In the third and final round, our sample size consisted of 45 consumers, with the heterogeneous demographic characteristics, as presented in Table 4.

Please Insert Table 4 About Here

Based on the dimensions discovered in Study 1 and previous research included in Table 3, the researchers formulated the key salesperson dimensions of customer orientation to evaluate in the first round of the Delphi study, as shown in Table 5 (Brown, Cron, and

Slocum, Jr. 1998; Clopton, Stoddard, and Clay 2001; Homburg, Müller, and Klarmann, 2011a; Panagopoulos, Rapp, and Ogilvie 2017; Schwepker 1999). Furthermore, the first round included both the functional and relational dimensions of customer orientation of salespeople based on previous studies and measurement scales (Amyx and Bhuian 2009; Crosby, Evans, and Cowles 1990; Donavan, Brown, and Mowen 2004; Dubinsky 1981; Homburg, Müller, and Klarmann 2011a; Lee and Dubinsky 2003; Saxe and Weitz 1982). Aspects related to functional and product information, such as the ability to answer questions, expertise, product knowledge, as well as businessperson characteristics like agreeableness, conscientiousness, emotional stability, and problem-solving capabilities are included in the basic, functional customer orientation (Amyx and Bhuian 2009; Crosby, Evans, and Cowles 1990; Dubinsky 1981; Homburg, Müller, and Klarmann 2011a; Saxe and Weitz 1982).

Please Insert Table 5 About Here

At the same time, the relational dimension of customer orientation includes salesperson characteristics focused on building personal relationships, such as caring, friendliness, honesty, and ethics (Amyx and Bhuian 2009; Crosby, Evans, and Cowles 1990; Donavan, Brown, and Mowen 2004; Dubinsky 1980; Homburg, Müller, and Klarmann 2011a; Lee and Dubinsky 2003; Saxe and Weitz 1982). The contexts examined in this study continue examining the two sales environments analyzed in Study 1 (retail and direct-selling); however, it is also important to investigate the differences in consumer preferences when dealing with a service failure, follow-up, or complaint situation. Furthermore, focusing on the possible negative characteristics of the interaction with the salesperson provides insight on what reduces the effectiveness of customer orientation and prevents the formation

of long-term relationships based on relational attributes (Homburg, Müller, and Klarmann, 2011a; Tadepalli 1995), as shown in Table 6.

Please Insert Table 6 About Here

The first Delphi round asked respondents to select the top five characteristics they think are most important for a salesperson for each context (retail, direct-selling, and service failure), as well as the top 5 characteristics that they disliked in a salesperson. It also included an open-ended question, where consumers could name attributes that were not already on the list. Table 7 presents the results of the first Delphi round of responses. The researchers ranked the top dimensions that consumers deemed most important in their interaction with a salesperson based on the total number of points received from respondents (three points if they were ranked first, two points if they were ranked second, and one point if they were selected as the third preference), as well as considering the percentage of consumers who chose the characteristic. The results reflected a combination of both the functional and relational aspects of customer orientation.

Please Insert Table 7 About Here

Identification of the top characteristics selected by consumers was used as a cutoff, with a combination of a minimum of 15 points and that the feature was selected by at least 25% of respondents, except for negative characteristics, which were reduced to only the top seven attributes for better refinement. The items emphasized in the first round of the Delphi study were further refined in Round 2, where respondents received only the most widely chosen concepts from the first round. As in the first round, it also included an open-ended

question, where consumers could name items that are not on the list. The instrument also

included keywords that consumers mentioned in the open question from Round 1, such as

empathetic and patient, which focused on the relational side of customer orientation. Round 2

was used to present respondents with the results for Round 1 and asked them to further refine

these characteristics by selecting their top three favorites. The results obtained in this round

were further employed for refinement in Round 3 when consumers were asked to choose, and

in this case, also rank their top three choices. While there is no precise number of rounds that

should be performed for a specific Delphi study, Round 3 of our analysis presented good

statistical results that emphasized the main characteristics important for consumers – our

"expert" informants (Kerr and Kelly 2017; Schmidt 1997). Table 8 presents the statistical

results for the final round.

Please Insert Table 8 About Here

The functional and relational characteristics of interest for over 50% of participants

are emphasized in bold in Table 8. Additionally, information on the frequency with which

attributes were selected and the number of points received from respondents is included. The

following section contains further discussion of the results and their implications for

researchers and practitioners.

Findings and discussion

Key findings

The qualitative content analysis (Study 1) shows that buyers expect and appreciate

salespeople prepared in both functional and relational customer orientation to be helpful,

knowledgeable, and communicate in a friendly manner with their customers. This also

generates a higher potential for positive word-of-mouth in both online reviews and social

media comments. Negative word-of-mouth is encountered in social media comments concerning expectancy dissatisfaction and role confusion when consumers need to manage and solve service failure situations (Bach and Kim, 2012; Clopton, Stoddard, and Clay 2001; Petrescu et al. 2019; Pettijohn, Pettijohn, and Taylor 2002; Romaniuk, 2007).

Also, the results of the Delphi study (Study 2) emphasize, with significant agreement from respondents, the importance of sales representatives to be knowledgeable and honest, as well as being capable of answering questions (Clopton, Stoddard, and Clay 2001; Schwepker 1999). Table 9 displays a summary of the findings across the various sales contexts examined. In the context of direct-selling, ethical behavior appears to be of significance for consumers. Whereas, when consumers find themselves in a service failure, follow-up situation, or in a complaint in need of help, then problem solving, empathy, and responsiveness become essential characteristics to consider, as shown in Table 9.

Please Insert Table 9 About Here

The dimensions mentioned by respondents emphasize their focus on customer orientation, the selling task, and their need for help when making purchase decisions (Gerlach et al. 2016; Marshall et al. 2012; Saxe and Weitz 1982). As the summary of the findings in Table 9 shows, while the two categories of customer orientation – functional and relational - are distinct, they are complementary when it comes to consumer expectations and as antecedents of consumer digital word-of-mouth (Bateman and Valentine 2015; Homburg, Müller, and Klarmann 2011a).

Functional customer orientation is considered task-oriented behavior (Homburg, Müller, and Klarmann 2011b), and as the results show, it is more important in a direct-selling context than in retail. In service failure situations when buyers need the seller to solve

problems (Grayson 2007; Heide and Wathne 2006; Homburg, Müller, and Klarmann 2011b), consumers' responses showed that functional orientation is essential, with a focus on the identification of customer needs and the ability to answer questions.

Relational customer orientation is meant to create a personal relationship with the customer (Grayson 2007; Heide and Wathne 2006; Homburg, Müller, and Klarmann 2011b). This reflects in our results in the importance of friendliness, ethics, and honesty. Ethics and honesty are also a primary emphasis in the direct-selling environment, while empathy is essential for consumers experiencing a negative situation. These aspects are also highly emphasized in cases when negative word-of-mouth was created, as in the themes revealed by the Facebook comments we analyzed. When it comes to negative aspects that consumers want to avoid, the findings show a consumer focus on the relational customer orientation of salespeople, especially regarding ethics and deception, reinforcing the need for trust in establishing long-term relationships (Garbarino and Johnson; Lee et al. 2018; Palmatier et al. 2006).

Implications for research

The results of this mixed-method research have important implications for sales and marketing scholars and practitioners alike. These studies demonstrated that salesperson customer orientation attributes are essential, but also showed that they differ as a function of the sales environment in terms of retail, direct-selling, and service failure contexts. Moreover, the studies also showed that both the functional and relational sides of salesperson customer orientation are critical to consumers. They represent a combination of attributes that consumers have come to expect in various sales circumstances, as well as a potential source for positive and negative word-of-mouth.

Therefore, this emphasizes the importance for sales and marketing scholars to account for the sales environment context in their research and the need to include both functional and

relational aspects in models that examine customer orientation. Nevertheless, these research findings reflect the role of the revised set of expectations of modern consumers for a high-quality sales encounter, strengthening the position of role theory and expectancy disconfirmation theory in a sales environment altered and dominated by digital technologies.

Implications for practice

In terms of implications for practitioners, since salesperson attributes that are important to customers differed by sales context, this emphasizes the importance of salespeople accounting for their sales setting when interacting with customers. Furthermore, this also demonstrates the importance of managers in customizing their hiring and training programs depending on the sales context in which their salespeople will find themselves. For instance, in retail settings, managers should look to hire salespeople that exhibit attributes of honesty, knowledgeability, and friendliness, as well as design training programs to reinforce and strengthen those attributes, since they were deemed to be most relevant to customers for that particular sales environment. However, in a direct-selling setting, while managers should still look for honest and knowledgeable individuals, they should also ensure those individuals are ethical and excel at handling customer questions. There is also a need to design higher education and training programs to educate salespeople regarding those areas since those were the attributes ranked as most important in that context (Harrison and Ajjan 2019; Yeoh 2019).

Moreover, as service failures are bound to occur from time to time, managers should also look to hire salespeople that are problem-solvers, helpful, responsive, and empathetic. Managers should also implement training programs and procedures that reinforce and strengthen these attributes since those were the attributes customers ranked as most important for service failures. Additionally, managers should avoid hiring individuals that are deceptive, pushy, or unethical, since those were deemed as the attributes that customers

disliked most. Managers could also design training programs and policies to further reinforce the importance of avoiding deception, pushiness, and unethical practices to ensure that existing salespeople understand their significance. In terms of uncovering these attributes in potential job candidates, managers can use many existing tools at their disposal, such as personality tests, interview questions, and role-playing scenarios. Thus, there are ways in which managers can work to ensure that they hire the right salesperson for the proper context.

Contributions and conclusions

Overall, this paper provides several contributions to sales and marketing practitioners and academicians alike. First, it demonstrates how consumers prioritize the dimensions of salesperson customer orientation in evaluations of their shopping experience in different settings and needs. It also analyzed differences in consumers' expectations regarding salesperson attributes and how these related to consumer interactions with salespeople as well as positive and negative word-of-mouth. The findings showed that consumers have significant expectations from both the functional and relational points of view, as complementary approaches to customer orientation, and that these differ as a function of the sales environment.

Furthermore, these findings also provide several benefits for sales and marketing researchers as well as for practitioners that are facing issues related to the digital economy and dealing with problems in attracting consumers to brick-and-mortar stores and direct-selling settings. The findings also contribute to the literature on role theory and especially on the theoretical framework of functional and relational salesperson customer orientation.

Limitations and directions for future research

While drawing several implications from this research, its limitations, and possible directions for future research should also be discussed. First, the Delphi study sample consisted of U.S. residents only. Therefore, its results cannot be generalized to other nations. Future

research studies could examine the important salesperson attributes identified here in an international or cross-cultural context to see if these same attributes are deemed as most important to consumers in other nations or if other characteristics are noted as more critical.

Additionally, it should be noted that our study focused on certain retail platforms and product sectors and it stands to reason that the results of our study may not generalize across all product sectors. Therefore, future research should examine the impact that product characteristics play in the relationships uncovered here as well. Furthermore, since salespeople are becoming a more substantial part of the online shopping environment via new tools such as live chat and video conferencing, future research could examine other sales contexts such as online shopping, to determine what salesperson attributes are most important to those customers. Nevertheless, more studies on positive and negative word-of-mouth relating to retail and direct-sales experiences are recommended, considering the evolution of the digital environment and online selling.

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Figure 1: Conceptual map of consumer reviews

Figure 2: Conceptual map of consumer Facebook comments
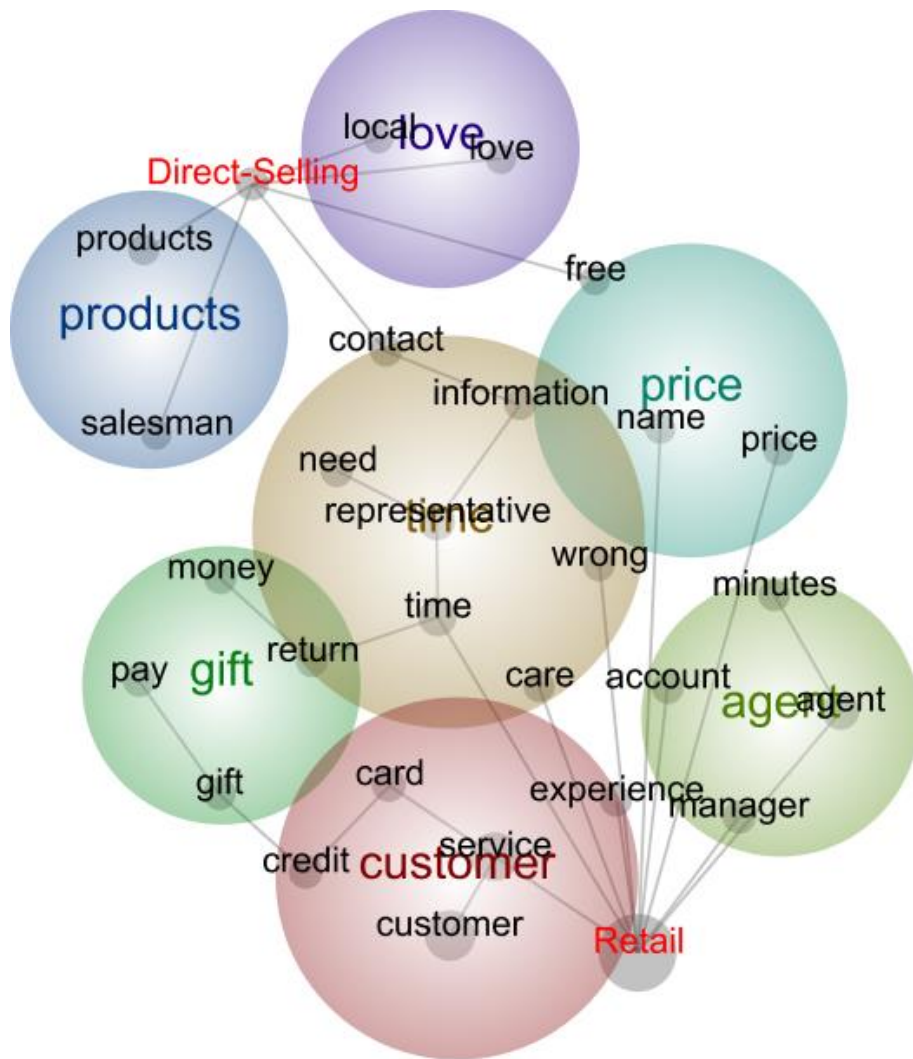
Table 1: Concept prominence score Google reviews

Concept	1	2	3	4	5	6	7	8	9	10
Helpful										
Service	0.61									
Friendly	**2.11**	**1.10**								
Need	0.97	0.94	0.81							
Knowledgeable	**1.92**	**1.03**	**2.46**	0.52						
Experience	0.93	**1.02**	0.85	0.73	**1.36**					
Nice	**1.94**	0.65	0.72	**1.14**	0.85	0.82				
Products	**1.39**	**1.41**	**1.29**	**1.06**	**4.11**	**1.68**	0.45			
Questions	**1.42**	**1.05**	0.94	0.86	**1.43**	**1.60**	**1.20**	**1.18**		
Care	0.30	**1.85**	0.35	**1.05**	0.27	0.90	**1.68**	**1.49**	**1.32**	
Money	0.24	0.72	0.21	**1.29**	0.65	0.66	0.82	**1.82**	0.54	**2.72**

Table 2: Concept prominence score Facebook comments

concept	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15
Customer Service	5.63														
Time	1.35	1.24													
Agent	1.62	1.85	0.85												
Representative	1.82	1.91	1.47	0.29											
Return	1.11	1.05	1.87	0.72	1.03										
Experience	1.82	1.84	1.48	1.15	0.67	0.47									
Money	1.43	1.48	2.12	0.62	0.77	3.79	0.66								
Information	0.82	0.92	0.66	2.38	1.60	0.70	0.87	0.71							
Minutes	1.48	1.55	1.99	1.77	1.94	0.98	0.79	0.61	0.84						
Care	2.57	2.12	0.96	1.11	1.09	0.82	0.63	5.38	1.42	0.33					
Wrong	1.73	1.15	2.10	1.45	1.58	2.00	0.40	0.72	2.80	2.22	0.77				
Products	0.94	0.76	1.45	0.54	0.76	0.80	0.21	1.04	1.98	0.41	0.77	1.45			
Price	0.70	0.82	1.18	1.11	1.45	1.05	0.61	0.66	0.15	0.63	0.88	0.92	0.89		
Salesman	0.60	0.54	0.99	0.00	0.37	1.13	0.78	1.13	0.32	0.67	1.51	1.38	0.48	2.36	
Love	0.72	0.86	1.14	0.43	1.88	0.21	1.18	0.43	0.00	0.51	0.00	0.00	4.55	0.55	0.59

Table 3: Dimensions of customer orientation reflected in the literature

Functional	Relational
performance focus (Dubinsky, 1980; Homburg, Müller & Klarmann, 2011; Saxe & Weitz, 1982; Schurr et al., 1985)	personal relationships (Crosby et al., 1990; Donavan et al., 2004; Homburg, Müller & Klarmann, 2011)
needs focus (Dubinsky, 1980; Homburg, Müller & Klarmann, 2011; Saxe & Weitz, 1982; Schurr et al., 1985)	common interests (Crosby et al., 1990; Donavan et al., 2004; Homburg, Müller & Klarmann, 2011)
functional knowledge (Dubinsky, 1980; Homburg, Müller & Klarmann, 2011; Saxe & Weitz, 1982; Schurr et al., 1985)	empathy (Bateman and Valentine, 2015; Crosby et al., 1990; Donavan et al., 2004; Homburg, Müller & Klarmann, 2011)
benefit focus (Dubinsky, 1980; Homburg, Müller & Klarmann, 2011; Saxe & Weitz, 1982; Schurr et al., 1985)	focused on customer needs (Bateman and Valentine 2015; Tadepalli 1995)
adapted sales pitch (Dubinsky, 1980; Homburg, Müller & Klarmann, 2011; Saxe & Weitz, 1982; Schurr et al., 1985)	Multi-level and multi-functional relationships (Cuevas 2018)
objection management (Dubinsky, 1980; Homburg, Müller & Klarmann, 2011; Saxe & Weitz, 1982; Schurr et al., 1985)	Understanding of human dynamics (Cuevas 2018)
informative (Bateman and Valentine 2015)	Ability to inspire trust (Cuevas 2018)
presentation skills (Bateman and Valentine 2015; Pettijohn, Pettijohn, & Taylor 2002)	Listening skills (Clopton, Stoddard, and Clay 2001; Cuevas 2018; Pettijohn, Pettijohn, & Taylor 2002)
product knowledge (Bateman and Valentine 2015; Pettijohn, Pettijohn, & Taylor 2002)	friendliness (Crosby, Evans, and Cowles 1990; Grayson 2007; Heide and Wathne 2006; Homburg, Müller, and Klarmann 2011a; Pettijohn, Pettijohn, & Taylor 2002)
professionalism (Bateman and Valentine 2015; Pettijohn, Pettijohn, & Taylor 2002)	Complaint management (Clopton, Stoddard, and Clay 2001)
Financial insight (Cuevas 2018)	ethics (Schwepker 1999; Tadepalli 1995)
Marketing knowledge (Cuevas 2018)	
Business acumen (Cuevas 2018)	
Strategic negotiation (Cuevas 2018)	
Customer insight (Cuevas 2018)	
answer questions (Tadepalli 1995)	
technology savvy (Cuevas 2018; Panagopoulos, Rapp, and Ogilvie 2017)	

Table 4: Demographic characteristics of Delphi sample (percent)

Gender	
Male	73
Female	27

Age	
Under 18	4
18 - 24	7
25 - 34	24
35 - 44	38
45 - 54	2
55 - 64	16
65 - 74	9

Income	
Less than $10,000	9
$10,000 - $19,999	9
$20,000 - $29,999	2
$40,000 - $49,999	7
$50,000 - $59,999	2
$60,000 - $69,999	7
$70,000 - $79,999	7
$80,000 - $89,999	11
$90,000 - $99,999	2
$100,000 - $150,000	31
More than $150,000	13

Education	
High School	16
Undergraduate	29
Graduate	31
Postgraduate degree	24

Occupation	
Employed full time	73
Employed part time	9
Retired	11
Student	7

Table 5: Expectations of functional and relational salesperson customer orientation

Dimensions	Category
Ability to answer my questions	Functional
Agreeableness	Functional
Caring	Relational
Communication skills	Functional
Confidence	Relational
Conscientiousness	Functional
Emotional stability	Functional
Engaging	Functional
Ethical	Relational
Experienced	Functional
Expertise	Functional
Friendly	Relational
Funny	Relational
Helpful	Functional
Honest	Relational
Interactive	Relational
Knowledgeable	Functional
Listening skills	Relational
Make helpful recommendations	Functional
Nice	Functional
Problem-solver	Functional
Tactful	Relational
Tech-savvy	Functional

Table 6: Negative salesperson interaction dimensions

Dimensions	Category
Aggressive	Functional
Arrogant	Relational
Deceptive	Relational
Dismissive	Functional
Egocentric	Relational
Liar	Functional
Pushy	Relational
Unethical	Relational
Unfriendly	Relational
Unhelpful	Functional
Untruthful	Relational

Table 7: Initial items in the Delphi Round 1

Item	Points	Percentage of respondents
Characteristics most important for a salesperson in a retail setting		
Ability to answer my questions	**36**	**67**
Communication skills	**33**	**61**
Knowledgeable	**29**	**54**
Listening skills	**22**	**41**
Honest	**21**	**39**
Helpful	**20**	**37**
Make helpful recommendations	**20**	**37**
Friendly	**18**	**33**
Expertise	**16**	**30**
Engaging	10	19
Ethical	9	17
Problem-solver	9	17
Confidence	8	15
Caring	6	11
Experienced	5	9
Nice	5	9
Interactive	5	9
Tactful	2	4
Emotional stability	2	4
Agreeableness	1	2
Conscientiousness	1	2
Tech-savvy	1	2
Funny	1	2
Characteristics most important for a salesperson in a direct-selling setting		
Honest	**31**	**57**
Knowledgeable	**30**	**56**
Ability to answer my questions	**28**	**52**
Expertise	**24**	**44**
Ethical	**23**	**43**
Communication skills	**21**	**39**
Listening skills	**19**	**35**
Friendly	**16**	**30**
Make helpful recommendations	**15**	**28**
Experienced	9	17
Confidence	8	15
Problem-solver	8	15
Caring	7	13
Engaging	7	13
Helpful	6	11
Nice	3	6
Tactful	3	6

Emotional stability	3	6
Conscientiousness	3	6
Tech-savvy	2	4
Funny	2	4
Agreeableness	1	2
Interactive	1	2

Characteristics in a service failure		
Problem-solver	**33**	**61**
Listening skills	**28**	**52**
Nice	**24**	**44**
Tech-savvy	**22**	**41**
Caring	**19**	**35**
Helpful	**19**	**35**
Honest	**18**	**33**
Knowledgeable	13	24
Ability to answer my questions	12	22
Expertise	11	20
Communication skills	11	20
Make helpful recommendations	10	19
Ethical	9	17
Friendly	8	15
Conscientiousness	7	13
Agreeableness	6	11
Tactful	5	9
Experienced	4	7
Emotional stability	4	7
Confidence	3	6
Engaging	2	4
Funny	1	2
Interactive	1	2

Characteristics most disliked in a salesperson		
Pushy	**41**	**76**
Aggressive	**34**	**63**
Arrogant	**32**	**59**
Deceptive	**25**	**46**
Dismissive	**24**	**44**
Liar	**23**	**43**
Unethical	**22**	**41**
Unhelpful	20	37
Untruthful	20	37
Unfriendly	18	33
Egocentric	11	20

Table 8: Results of the Delphi final round

Item	Points	Frequency	Percent	Mean	Mode	S.D.
Characteristics most important for a salesperson in a retail setting						
Honest	**43**	**23**	**51**	**2.13**	**3**	**0.87**
Knowledgeable	**32**	**35**	**78**	**1.89**	**1**	**0.83**
Helpful	40	20	44	2.27	2	0.80
Friendly	**38**	**22**	**50**	**2.27**	**2**	**0.70**
Listening	24	11	24	1.82	1	0.87
Answer questions	45	21	47	1.86	1	0.73
Characteristics most important for a salesperson in a direct-selling setting						
Honest	**73**	**30**	**67**	**1.57**	**1**	**0.73**
Knowledgeable	**50**	**24**	**53**	**1.92**	**1**	**0.88**
Expertise	19	10	22	2.1	2	0.74
Listening	32	20	44	2.4	3	0.88
Ethical	**55**	**27**	**60**	**1.96**	**2**	**0.65**
Answer questions	**41**	**24**	**53**	**2.29**	**3**	**1.43**
Characteristics in a follow-up						
Honest	25	20	44	2.95	3	1.43
Empathetic	**45**	**26**	**58**	**2.27**	**2**	**0.78**
Helpful	**29**	**23**	**51**	**3.09**	**2**	**1.62**
Listening	47	22	49	2.05	1	1.53
Problem-solver	**73**	**37**	**82**	**2.08**	**2**	**1.06**
Responsive	**45**	**31**	**69**	**2.84**	**3**	**1.61**
Characteristics most disliked in a salesperson						
Pushy	**47**	**25**	**56**	**2.12**	**2**	**0.78**
Aggressive	36	19	42	2.11	2	0.81
Unethical	**54**	**25**	**56**	**1.84**	**1**	**0.85**
Dismissive	36	17	38	1.88	1	0.93
Arrogant	43	20	44	1.85	1	0.88
Deceptive	**42**	**23**	**51**	**2.17**	**2**	**0.72**

Table 9: Expectations of salesperson customer orientation

Customer orientation	Retail setting	Direct-selling	Service failure	Negative
Functional	Knowledgeable	Ability to answer questions Knowledgeable	Helpful Problem-Solver Responsive	
Relational	Friendly Honest	Ethical Honest	Empathetic	Deceptive Pushy Unethical