A TYPOLOGY OF COORDINATION STRATEGIES EMPLOYED BY BUSINESS-TO-BUSINESS SALESPEOPLE

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Salespeople in business-to-business markets have a wide network of resources and personnel to coordinate both within their own organization and within the customer's organization. The salesperson's success in customer account management depends on achieving superior coordination of internal and external activities (Workman, Homburg and Jensen 2003). In general, regardless of the degree of formalization of account management structures, salespeople spend the majority of their efforts coordinating activities (Homburg, Workman and Jensen 2002). Yet very little is known about the coordination strategies employed by business-to-business salespeople. This study attempts to begin to address this gap by introducing a typology of coordination strategies.

INTRODUCTION

The conceptualization of selling in business markets has advanced from that of primarily an individual activity to that of an involved process requiring coordination across and within organizational boundaries (Cespedes, Doyle and Freedman 1989; Homburg, Workman and Jensen 2002). Business-to-business salespeople are responsible for organizing and managing a diverse array of internal specialists for each buying organization and particular buying situation. This creates a dynamic selling and delivery environment in which multiple experts from across organizational units and geographies are involved. The fluid participation of organizational members who contribute different types of expertise on the selling side coupled with the unique characteristics of each customer organization increase the complexity of coordination for the salesperson.

The sales literature suggests that salespeople create customer value by gaining access and leveraging talent found throughout the organization (Beverland 2001; Ustuner and Godes 2006). In these business-to-business environments, a salesperson's success depends on achieving superior coordination of internal and external activities (Workman, Homburg and Jensen 2003). While coordination is one of the most discussed concepts in organizational theory, it is also one of the least developed (Cheng 1984). The theoretical distinction between coordination and cooperation is well-noted as far back as the classic work of Simon (1976) and Georgopoulos and Mann (1962), yet our marketing literature frequently uses the terms "teamwork", "cooperative mechanisms", or "collaboration" and "coordination" interchangeably. These semantic misuses become of concern in the development of theories of sales representative effectiveness given the fundamental importance of coordination strategies in account management.

Research on coordination to date has been isolated to the organizational or departmental level of analysis, and primarily suggests either the presence or absence of coordination, or emphasizes the degree of coordination within the organization (cf. Cespedes 1992; Cheng 1984; Jap 1999; Mohr and Spekman 1994; Sahadev 2008). Lacking in our literature is a unifying framework specifying the types of coordination strategies used by salespeople and the conditions that these strategies may be used. This research attempts to address this gap. The purpose of this paper is to present a typology of coordination strategies used by salespeople to integrate company resources in business markets. The resources may include people

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(individual experts, teams, administrators, etc.), products/services, capital equipment, technology and finances. Coordination strategies of salespeople are defined here as *the ways in which salespeople decide and plan to bring together diverse organizational resources aimed at enhancing customer account performance*.

The typology of coordination strategies suggested offers a parsimonious framework extending our understanding of the behaviors of salespeople. Doty and Glick (1994, p. 244) note the critical benefit of typological theories is that typologies "allow us to move beyond traditional linear or interaction (i.e., contingency) theories" (p. 244). Typologies offer a classification of concepts, or ideal types, based on a collection of attributes of the phenomenon. Given the multiplicity of patterns associated with sales representatives' approaches to account management, theories that describe relationships that encompass the synergistic and nonlinear sales environment are necessary. Typologies offer such an advantage.

The paper is outlined as follows: First, the relevant literature on coordination will be reviewed. Second, a description of typologies and a framework of strategy in general will be discussed. Third, a typology of coordination strategies will be proposed.

THEORY DEVELOPMENT

Coordination Activities

Salespeople have a myriad of activities to coordinate across multiple accounts and organizations. Activities include assessing account financials (including account penetration, share-of-wallet, and profitability), working with customers to reduce distribution costs, determining order and delivery status, establishing necessary upgrades, organizing and presenting information and resources on new or unused products and services to the customer, resolving account problems (including service, billing, and pricing), altering distribution needs for customers, acquiring information to increase the customer value proposition, determining new customer needs, and making regular contact with decision-makers in the customer's organization. The resources and competencies needed to manage a customer account are frequently spread throughout the salesperson's organization and the customer's organization, and/or nestled in pockets of the environment external to both firms. Further, coordination activities may be initiated for a wide-range of reasons. These reasons may include aims to solve customer problems, to take advantage of an organizational opportunity, or to counter an external threat. Thus, the complexity and diversity of activities engaged in to management customer accounts in the business-to-business environment make a typology of coordination strategies of even more value to gain a deeper understanding of account management and account performance.

Literature Review

Previous research on the concept of coordination has been focused on the organizational or departmental level (cf. Cespedes 1992; Hsieh, Chiu and Hsu 2008; Jap 1999; Olson, Walker and Ruekert 1995; Sivadas and Dwyer 2000; Van de Ven and Walker 1984). Unexplored are the specific types of coordination strategies used at the individual salesperson level. Previous literature, for example, has focused on the value and necessity of coordination for an organization. For example, Sivadas and Dwyer (2000) conceptualize coordination as a component of cooperative competency in interorganizational new product development relationships. They found coordination, as a part of the second-order factor cooperative competency, contributes to the success of new product development. Jap's (1999) research on buyer-supplier relationships found the coordination efforts in collaborative exchanges enhanced profits and competitive advantage. In conditions where two firms provide modest investments to a project and have high uncertainty in the environment, Buvik and John (2000) found benefits to the firms from vertical coordination (or activities and information flow organized purposefully in an interorganizational context).

In the sales management literature, Cespedes (1992) investigated normative and positive perceptions of organizational mechanisms (such as compensation and systems of governance) that encourage salespeople who call upon the same account to coordinate their activities. The exploratory research proposed that technologically complex products with shorter product life cycles and decentralized purchasing processes require greater coordination efforts. While identifying contextual factors that increase the need for coordination, isolation of coordination strategies was not explored.

Olson, Walker and Ruekert (1995) linked both formality and the participative nature of organizational coordination mechanisms to characteristics associated with new product development. One of the major findings of their research is the more experience a firm and customer has with the new product concept being developed, the more participatory the coordination mechanism. Further, the better the fit between experience and the coordination mechanism, the better the new product outcomes.

In a longitudinal study, Van de Ven and Walker (1984) examined the ad hoc coordination efforts between organizations. They found the most important stimulus of coordination activities between firms to be the perceived need for resources to accomplish organizational goals. Critical to the current study is their finding that the pattern of coordination differed across organizational activities depending upon the type of resources being coordinated. This suggests that there is not just one approach to coordination and gives credence to the existence of a collection of coordination strategies that may be relevant and effective in one condition, yet inappropriate and ineffective in other situations.

March and Simon's (1958) classic work suggests that there are two main approaches to coordination: coordination by feedback and coordination by plan. Coordination by feedback involves linking activities in response to new information, constantly making adjustments to activities based on feedback. Coordination by plan follows pre-established schedules and routines. Hage, Aiken and Marrett (1971) suggest that both of these approaches are aimed at the same outcomes—integration of activities—they note, however, that the strategy of coordination is still unknown.

Yet, the literature on interorganizational coordination is clear—effective coordination enhances performance. Intra- and interorganizational processes are inherently grounded at the individual level, thus the individual is a natural referent point for analysis (Alter 1990). Further, given that "the strategic role of marketing arises as a result of the boundary-spanning nature of the function" (Varadarajan and Jayachandran 1999, p. 121), understanding the nature and diversity of coordination strategies employed by salespeople to integrate company resources and competencies to enhance customer account performance is central to developing a comprehensive theory of salesperson effectiveness.

TYPOLOGIES

Typologies as Theory-Building

Several typologies have been suggested in the sales management and marketing strategy literature, including a typology of avatars in e-shopping environment (McGoldrick, Kelling and Beatty 2008), a business socialization typology (Dorsch et al. 2001), a typology of marketing signals (Kirmani and Rao 2000), a marketing management support systems typology (Wierenga and Van Bruggen 1997), and a typology of interfirm governance (Heide 1994). However, given the common confusion in the social science literature on the difference between a typology and a classification system/taxonomy, it is useful to state clearly the definition and intention of a typology before moving further. A typology is a "conceptually derived interrelated set of ideal types" representing unique combinations of attributes determining specific outcomes (Doty and Glick 1994, p. 232). This research identifies three ideal-type coordination strategies. Doty and Glick (1994) make clear that unlike a classification system, typologies do not provide decision rules for assigning organizational members to a mutually exclusive set of factors. Literature as early as Weber (1949) notes the use of ideal types, or typologies, in the creation of theory. The goal of this research is to produce a typology that guides the sales management literature in understanding the behavior of salespeople in coordinating internal and external activities that impact customer account performance.

Strategic Framework

The focus of this research is on the creation of a typology of coordination strategies. A framework is needed to structure the explanation of each typology. The work of Varadarajan and Jayachandran (1999) is drawn upon. Specifically Varadarajan and Jayachandran (1999) suggest that regardless of the level of the strategy, three aspects of strategy exist: content, formulation process, and implementation. These characteristics of strategy are especially useful in the development of a typology of coordination strategies where the literature is vague as to specific actions involved in coordination. Applying the aspects of strategy suggested by Varadarajan and Jayachandran (1999) to coordination strategies, *content* refers to what the relationships are among the resources and the pattern of resource application; *formulation process* refers to how the coordination strategy is arrived at and the collection of activities that the salesperson engages in that enable him/her to determine the strategic content; and *implementation* refers to the way the coordination strategy is carried out, the actions and activities the salesperson initiates internally and externally.

TYPOLOGY OF COORDINATION STRATEGIES

Three typological coordination strategies of salespeople are proposed. Each is specified along the content, formulation process and implementation framework, and guided by relevant literature in sales management, organizational behavior, and organizational psychology. Each of the three strategies are explained in the following sections. Figure 1 summarizes the content, formulation process and implementation components of each strategy.

FIGURE 1
Summary Components of the Typology of Coordination Strategies

Routine-Centric	Customization-Centric	Situation-Centric
Content: High interconnectness Routinization of resources	**Content:** Complex/unique patterns of loosely connected resources	**Content:** Routinely or newly used combinations of resources
Formulation Process: Customer Request	**Formulation Process:** Salesperson's strategic ability	**Formulation Process:** Either customer or salesperson initiated
Implementation: Formal Communication	**Implementation:** Informal communication	**Implementation:** Both formal and informal patterns of communication

Routine-Centric Coordination Strategy

The first typology, labeled the *Routine-Centric* coordination strategy focuses on the use of strong interconnected and routinized resources. The content of the Routine-Centric strategy makes use of the existing routines and regular interactions of both the salesperson's organization and the customer's organization. This strategy emerges from the "coordination by plan" approach discussed by March and Simon (1958). By using previously established, highly interconnected resources within both firms, the salesperson can easily initiate the Routine-Centric strategy and decrease the time necessary to explain to members the desired outcome envisioned. This is accomplished simply because the employees (both internal and external) sought under the Routine-Centric strategy frequently work with one another on specified problems and tasks, and are members of a highly interconnected existing network who routinely perform together. This strategy frequently excludes new internal and external participants. The strategy's focus on using existing structures and relationships minimizes the cost of new interactions and increases efficiency. The disadvantage of this strategy is the salesperson's tendency to force problems and tasks to be coordinated by existing routines, even if the current routines are inappropriate or minimally effective. Madhavan and Grover (1998, p. 4) define routines as "the set of regular and predictable patterns of organizational behavior." They note that team members who have worked together before and have established routines are more effective and better combine each individual's tacit knowledge. However, they also caution of the disadvantages of routines. For example, as group members become more familiar with one another, performance can decrease due to miscoding of events and reduction in innovation.

The formulation process of the Routine-Centric strategy begins with a customer request. Salespeople employing the Routine-Centric strategy are highly informed by the customer and rely primarily on the customer's stated needs to begin any integration of company resources. The advantage of this strategy is clearly its attention to customer needs. This is, however, quite distinct from a "customer orientation", defined as the "degree to which salespeople practice the marketing concept by trying to help their customers make purchase decisions that will satisfy customer needs" (Saxe and Weitz 1982, p. 344). Under a Routine-Centric coordination strategy, while the salesperson is aware of customer needs and organizational competencies, there is no intention to proactively seek to solve customer problems that cannot be solved with an existing organizational mechanism or routine. While the salesperson is not proactively attempting to solve customer problems (unless a current routine exists to solve an observed problem), the salesperson is highly informed of issues important to the customer.

The implementation process of the Routine-Centric strategy is highlighted by the reliance upon formal communication. The systematic routines within each firm drawn on by the salesperson will tend to have the bureaucratic or formal mode of communication as a requisite for action. The degree of formality of communication has been defined by Mohr, Fisher and Nevin (1996, p. 105) as the extent that contacts are "routinized, planned, or structured, as opposed to unplanned, fleeting, or ad hoc in nature." Formal means of communication can rely on written correspondence and group meetings; whereas, informal communication tends to be more spontaneous and personalized (Johlke and Duhan 2001).

Customization-Centric Coordination Strategy

Unlike the Routine-Centric strategy, the content of the *Customization-Centric* coordination strategy is marked by bringing together a complex pattern of unique resources for each customer engagement. The resources employed by the salesperson are highly situational-based. Often the resources are brought together for the first time and, therefore, may never be formed together in the same way. This loose connection of new and inimitable resources is highly effective in tackling problems, but it can be time and energy consuming to bring together the resources to address a new concern each time. At the foundation of this strategy is the "coordination by feedback" approach suggested by March and Simon (1958). Salespeople using the Customization-Centric coordination strategy find the new combinations of teams and resources high in innovative ability. Thriving on the challenge of meeting specific demands of their organization and the customer's organization, the salesperson following a Customization-Centric coordination strategy aims to bring together an ideal combination of resources tailored to the exact problem at hand and to the contextual factors present. However, new groupings of resources may be rich in ability to address problems in an innovative way, but negatively weighted in the degree of potential ambiguity and conflict involved in the process. However, some research suggests that the informal communication unrelated to the task of a group may increase conflict resolution, problem-solving, and task coordination (Van den Bulte and Moenaert 1998). Thus, the frequent, informal communication present with this strategy may mitigate the negative effects inherent in the constant grouping of new resources.

The formulation process of the Customization-Centric coordination strategy is guided by the salesperson's strategic ability, encompassing the representative's ability to discover opportunities for and determine threats to a customer's business (Sengupta, Krapfel and Pusateri 2000). Strategic ability is obtained partly through asking the "right" questions, and frequent interaction with personnel in both firms (Sengupta, Krapfel and Pusateri 2000). Salespeople with strong strategic ability spend time meeting with members throughout both their own organization and the customer's organization to collect intelligence on a range of issues that will guide the coordination strategy.

The implementation process of the Customization-Centric coordination strategy is one of informal, constant communication. The aim of the Customization-Centric strategy is to create highly synergistic solutions for the firm and customer guided by informal and frequent communication (Schultz and Evans 2002). In the communications literature, informal, spontaneous communication across functions has been found to enable collaborative work and problem-solving (Mangrum, Fairley and Wieder 2001).

Situation-Centric Coordination Strategy

The *Situation-Centric* coordination strategy is a hybrid of the previous two typologies. In explicating the hybrid, this research aims to address Doty and Glick's (1994) criticisms of previous typologies in which a hybrid conceptually existed but was not described within the framework. For typologies to be useful, the set of ideal types should be included. Core to the Situation-Centric coordination strategy's content is recognition of whether or not an existing pattern of resources may be successfully applied or "reused," or if a new set of resources needs to be assembled.

In contrast, the Routine-Centric coordination strategy focuses on applying existing company processes and pre-existing groupings of resources to each situation. The belief of the Routine-Centric strategy is that pre-existing structures are appropriate and can replicate results in the next situation. The Customization-Centric coordination strategy, on the other hand, creates newly tailored solutions for each customer engagement with the underlying belief that each situation warrants a new arrangement of resources. In contrast to these two typologies, the Situation-Centric may at times make use of the exact same combination of resources brought together before, whether it is the same teams, the same product/services, the same problem-solving routine, etc. At other times, the Situation-Centric coordination strategy will lead the salesperson to see the need for an entirely new grouping of resources that have not been used the same combination before.

The content of the Situation-Centric coordination strategy thus involves the salesperson's ability to know when a previous pattern of resources is best-suited or if newly organized resources are more appropriate. The skills of recognizing which set of resources or which approach is better is highly dependent on a salesperson's knowledge of what is happening outside his/her geography, as well as outside his/her specialization (whether product/service or industry specialty). For example, a very successful coordination strategy may have been executed with a banking customer on the east coast, and may be extremely relevant to a salesperson working with a regional bank in the Midwest. However, if the salesperson has no knowledge of other coordination strategies used across the company's geography, the salesperson's repertoire will not include those possibilities of which he/she has no knowledge. Additionally, this coordination strategy's content includes the salesperson's working memory of all previous customer engagements. Future customer engagements may benefit both from what worked well with a customer, as well as what was less successful. While salespeople may wish to mentally eliminate failures, there is a rich source of knowledge that can come from these experiences, especially so when the salesperson is deciding which approach to employ in coordinating firm resources.

The formulation process of the Situation-Centric coordination strategy may be initiated by a customer request or the salesperson's development of a proposal or action for the customer. The implementation of this hybrid can include combinations of formal, routine communication as well as highly irregular and informal communication.

Early research in business (Simon 1960) described management decisions as programmed or non-programmed. The former involves routine decisions made repeatedly over time, and the latter involves unique decisions. The hybrid coordination strategy allows navigation from more routine decisions to those that require greater novelty of strategy. However, for salespeople in environments in which well-developed company procedures are in place, a Routine-Centric coordination strategy may be best fitting and offer optimal performance. When task uncertainty is high though, a more Customization-Centric coordination strategy may produce better results. In still other cases, the hybrid Situation-Centric coordination strategy may be more appropriate. The typologies offer an approach to begin developing a fuller understanding of how salespeople coordinate organizational resources for customers in the business-to-business environment.

SUMMARY

A typology of coordination strategies of the resources that salespeople in business markets orchestrate for customers has been suggested. Currently there is a dearth of research on individual-level coordination activities that are used to effectively manage customer accounts. This research attempts to address this gap and suggests a testable typology that can be extended to research in sales management. The three typologies use the framework for strategies suggested by Varadarajan and Jayachandran (1999) that includes the dimensions of content, formulation process and implementation process. This framework allows a description of what types of resources are brought together, what initiates the process, and how the coordination process is executed.

This typology represents a first step toward understanding how salespeople in business markets may approach the organizational need to create value for customers through coordinating organizational assets. Future research is needed to deepen our understanding of the process salespeople utilize to coordinate organizational talent and expertise, and how salespeople capitalize on a web of relationships to create exceptional solutions for customers.

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