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ORIGINAL EMPIRICAL RESEARCH

The coordination strategies of high-performing salespeople: internal working relationships that drive success

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Abstract The authors fill a gap in the salesperson performance literature by exploring the process that salespeople follow in coordinating the activities of ad hoc team members during high-opportunity customer engagements in the business market. In a two-phase study, the authors conduct depth interviews with salespeople and survey sales managers from a *Fortune-100* company to identify the processes involved in the coordination of expertise. In Phase I, analysis of qualitative data reveals that higher-performing salespeople are more likely to (1) consider relational as well as technical skills when matching team members to customer requirements, (2) attract their preferred experts to the team, including a member to perform the project manager role, and (3) define the appropriate time in the sales cycle to initiate contact with the customer and deploy the team to the customer organization. Adopting a social network perspective in Phase II, the reputation of a salesperson's internal working relationships and, to a lesser extent, the diversity and strength of their relationship ties are central in explaining effective coordination of expertise. In turn, coordination of expertise is linked to salesperson performance.

Keywords Coordination of expertise · Sales management · Ad hoc selling teams · Internal working relationships

> *A large part of my job is to bring the needed expertise to the customer organization. I need to put together the right group of people for that customer. At any given time, I may be managing 6–12 teams for 6–12 different customers.*
>
> (A salesperson for a *Fortune-100* high-technology firm)

Repeated calls have been made to expand the conceptualization of the salesperson's role to better reflect current realities and trends in business practice (Weitz and Bradford 1999; Jones et al. 2005a; Brown et al. 2005). As firms seek competitive advantage by offering increasingly complex customer solutions (Tuli et al. 2007), the development and delivery of these often customized solutions are no longer the responsibility of an individual salesperson, but instead are crafted by an ad hoc, cross-functional team that is assembled and managed by the salesperson to meet specific customer requirements (Cespedes et al. 1989; Homburg et al. 2002; Ustuner and Godes 2006). As "relationship managers" (Crosby et al. 1990), "integrators" of organizational resources (Plouffe and Barclay 2007), and "boundary spanners who interrelate with multiple stakeholders" (Mulki et al. 2007), salespeople must draw on the contributions of a diverse set of organizational members to create a compelling value proposition for the customer. As noted by Ustuner and Godes (2006: 2), to be successful, salespeople need "access to the right information, the ability to disseminate it to the right people, and the power to *coordinate* efforts of groups of people to deliver value to the customer" (emphasis added).

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To this end, coordination of expertise is fundamental to the salesperson's role in the business market, particularly for high-opportunity and complex customer engagements.

Drawing on Faraj and Sproull (2000) and Faraj and Yan (2006), we define the coordination of expertise as the process that the salesperson follows in diagnosing the customer organization's requirements and subsequently identifying, assembling, and managing an ad hoc team of organizational members who possess the knowledge and skills to deliver a superior customer solution. While a rich body of research has centered on the adaptive processes that pertain to the salesperson-customer dyad (Weitz et al. 1986), far less attention has been given to the corresponding adaptive processes initiated by the salesperson within the selling organization. Indeed, we concur with Plouffe and Barclay's (2007) assertion that a better understanding of the intraorganizational behavior of salespeople may hold special promise for increasing the variance explained in sales performance across salespeople. To this end, our paper extends the conceptualization of the sales role to include the intraorganizational activities performed by the salesperson in identifying and aligning needed resources to a particular customer engagement.

Our focus is on complex sales situations in business markets, which are characterized by large dollar values, protracted sales cycles, customized solutions, and the involvement of many organizational members on both the buying and selling sides. Frequently, these are sales situations where a salesperson is assigned to a particular set of customers and then assembles an ad hoc team as customer requirements or opportunities dictate. For example, large information-technology firms reserve key account teams for a carefully chosen set of customers but rely on an assigned salesperson, who can activate an ad hoc team as needed to cover the vast majority of large enterprise customers. By exploring the fluid participation of experts who contribute to a particular customer engagement, our perspective stands in sharp contrast to traditional studies of team selling. The limited research in the team selling domain (Jones et al. 2005b) centers on the interactions among team members who are pre-assigned and dedicated to a particular customer (e.g., Deeter-Schmelz and Ramsey 1995; Perry et al. 1999; Strutton and Pelton 1998).

Given the limited literature on coordination of expertise, following Ulaga and Eggert (2006) in a two-phase study, we first conducted depth interviews with 60 salespeople at a *Fortune-100* high-technology firm, using a grounded theory approach (Glaser and Strauss 1967), to gain managerial insights into the processes and strategies that salespeople use to coordinate expertise for both successful and unsuccessful customer engagements. Using this data, in Phase I we identify the processes involved in the coordination of expertise in the selling context and create a measure of the coordination of expertise. To address the final research objective, in Phase II, using survey data provided by both the salesperson and sales manager regarding the salesperson's network of internal working relationships, we examine the degree to which the characteristics of a salesperson's internal relationships underlie effective coordination of expertise. We also explore the relationship between the coordination of expertise and salesperson performance. Finally, the mediating role of coordination of expertise on the internal working relationship-salesperson performance linkage is investigated.

This exploratory study offers three contributions to the marketing literature. First, our study fills a gap in the sales literature by defining the processes and strategies that a salesperson adopts in coordinating the expertise of ad hoc team members. A continuous theme in the marketing literature is that successful selling is contingent upon the matching of organizational capabilities to customer wants and needs (Szymanski 1988). This matching process is, in part, performed at the firm's boundary as salespeople determine and access the most appropriate organizational experts required for a specific customer. While the integration of selling efforts has been highlighted as a key dimension that shapes customer impressions of the selling organization (Churchill et al. 1990), little is known about the coordination activities that are employed by successful salespeople and repeated successfully across a series of customer engagements. Our study provides a rare examination of the best practices of high-performing salespeople and identifies key strategies they use to align the talent and expertise of the firm with the particular customer requirements that a sales situation presents.

Second, our study represents the first, to our knowledge, that incorporates the salesperson's internal working relationships explicitly into an examination of salesperson performance. The salesperson is inherently embedded in a social system within the firm. We focus explicitly on how the diversity, reputation, and strength of the salesperson's internal relationship network influence coordination of expertise effectiveness. We apply the rich research tradition on social capital (e.g., Burt 1997) to better understand effective coordination of expertise in the account management domain.

Third, by examining each salesperson's ability to coordinate expertise within both a successful and unsuccessful customer engagement, we are better able to discern if a salesperson's success is the function of the type of engagement and/or individual ability. With few exceptions, literature to date has not examined overall salesperson performance in conjunction with both a successful engagement and an unsuccessful engagement for the same individual. High performing salespeople, however, are not always successful, nor are lower performing salespeople

always unsuccessful. The inclusion of successful and unsuccessful engagements presents an opportunity to more deeply understand account management processes.

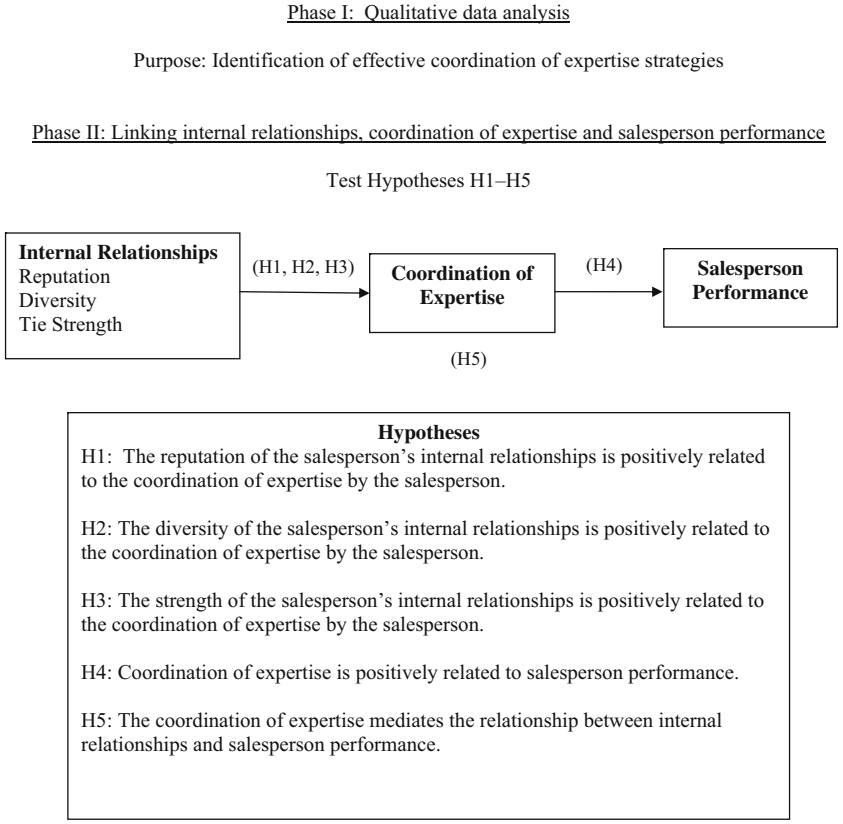
This paper is organized as follows (see Fig. 1). First, we present a brief overview of the literature on coordination of expertise. Second, we present the results of our qualitative study (Phase I) designed to reveal the processes and strategies involved in coordinating expertise. Next, drawing on the research tradition on social networks (i.e., Borgatti and Cross 2003), we develop and test hypotheses regarding the salesperson's internal relationships that drive effective coordination and explore the relationship between coordination of expertise and salesperson performance. The results of the Phase II study are then presented. Finally, implications for theory and practice are suggested and the limitations of the study discussed.

Coordination of Expertise

Salespeople create customer value by gaining access and leveraging talent found throughout the organization to develop and deliver customer solutions (Beverland 2001; Plouffe and Barclay 2007; Ustuner and Godes 2006). This process of identifying and utilizing expertise within an organization has been described as "a non-trivial process complicated by a variety of social and interpersonal processes" (Bunderson 2003: 558). As customer solutions increase in complexity, salespeople cannot rely on their own expertise to solve customer problems, but must turn, instead, to others within the organization who retain the specific knowledge that will be helpful to customers. Over time, transactive memory systems develop (e.g., Hollingshead 1998; Wegner 1986) so that a salesperson understands "who knows what" within the organization, and can identify just the right expert to meet a customer need. Accessing and gaining the cooperation of a particular expert, however, may depend on the strength of the relationship that the salesperson has forged with the organizational expert.

Indeed, Borgatti and Cross (2003), for instance, find that individuals are more likely to seek information from others with whom they have a personal relationship. Recent research demonstrates that personal relationships enhance the sharing of specialized knowledge among experts (Jarvenpaa and Majchrzak 2008). Further, in organizations whose members are dispersed across geographic regions, research has found that the most profitable projects are associated with managers who weigh the costs and benefits of including local team members versus geographically distant members who hold rare knowledge in a particular domain (Boh et al. 2007).

Figure 1 Study Overview



What are the processes involved in coordinating expertise? Drawing on the transactive memory and social network research traditions, Faraj and Sproull (2000) offered an initial examination of coordination of expertise in the context of relatively stable, pre-assigned software development teams. Specifically, they delineated three stages that are important in a team's ability to coordinate expertise: (1) knowing where expertise is located within the organization, (2) including experts with the specialized knowledge needed for software development tasks, and (3) accessing the expertise when needed in the project context. They found that the team's knowledge of where expertise is located (location), as well as the willingness of team members to share information with their colleagues (access) were positively related to a team's ability to meet project objectives. However, possessing the appropriate specialized knowledge on the team was not significantly related to team performance. Clearly, this early research was important, revealing that the team processes involved in coordinating expertise are positively related to team performance. Indeed, this work spawned additional research (Rico et al. 2008; Woolley et al. 2008) that has also addressed how members, who are assigned to established teams, effectively coordinate expertise.

Our research on coordination of expertise differs from Faraj and Sproull's (2000) study on three important counts. First, the focal task examined in our study centers on the creation of a solution for an external constituent—the customer—as opposed to the intraorganizational software development task in their study. By moving beyond the boundaries of the organization, the customer focus adds an additional layer of complexity to the coordination process, placing a premium on identifying and attracting to the team those experts who have close relationships with external stakeholders. Awareness of such external relationships represents a type of transactive memory system that is separate from task-specific memory (e.g., a software development task) (Austin 2003). Second, rather than an established team with assigned members, we examine ad hoc teams comprised of members who face competing demands and possess a degree of latitude in allocating their time across work assignments. Third, the unit of analysis in our study is the individual salesperson, rather than the team as a whole. Our conceptualization of the coordination of expertise highlights the challenging lead role the salesperson assumes in identifying, attracting, and deploying those experts who are best equipped to meet customer requirements.

Phase I Methodology

Data collection and sample

Procedure To capture the strategies involved in the coordination of expertise, structured depth interviews were conducted with salespeople employed by a *Fortune-100* high-technology company that provides a comprehensive line of information technology products and services to organizations across industries in the business market. Depth interviews have been used effectively in the marketing literature, especially in the business-to-business context when limited research is available (Flint et al. 2002; Madhavan and Grover 1998; Tuli et al. 2007; Ulaga and Eggert 2006). The use of a single firm for data collection is consistent with an empirical research tradition examining intricate process phenomena (DeCarlo et al. 1997; Dixon et al. 2005; Dixon et al. 2003; Houston et al. 2001).

Pilot study First, individual one-hour depth interviews with three high-performing salespeople were conducted to provide some initial insights into the nature of the customer engagements and the processes involved in coordinating expertise. In each interview, the salesperson was asked to think about one successful and one unsuccessful customer engagement. Each salesperson was then asked a series of questions regarding each of the two engagements from the initial opportunity assessment to the identification, selection, assembly, and management of experts needed for each ad hoc team. After minor refinements to the interview protocol, the depth interviews for the qualitative study were conducted.

Sample We conducted depth interviews with 60 salespeople who were identified by sales executives in the sponsoring organization. Specifically, the sales organization categorized the salespeople into three groups: high performers (n=22), average performers (n = 23), and low performers (n=15), based on several criteria including the salesperson's individual sales and profit performance over the past 3 years and customer satisfaction ratings. The salespeople in the sample are drawn from a large information-technology services unit and work hand-in-hand with a separate sales team from the product (hardware) division. The sampled salespeople managed the entire sales cycle for information-technology services, from prospecting to post-delivery service. Specifically, they were responsible for forming, managing, and leading cross-functional selling teams to develop and deliver multi-million dollar service solutions for customers. The average tenure at the sponsoring firm for a participant was 15 years. In addition, the average revenue for each customer engagement that was described by the study participants was $8.5 million.

Protocol We used a structured set of questions to elicit participants' responses regarding the processes that they used to coordinate expertise for both a successful and an unsuccessful engagement. First, after securing background information, we asked salespeople to identify and describe two customer engagements that they had completed in the

last 6 months: one considered more successful and one less successful. This provides an examination of a full range of coordination behaviors and is in line with the approach followed by Dixon et al. (2001). Salespeople used metrics such as profitability, customer satisfaction, and the degree to which the project met budget and time expectations to select the particular engagements that were more or less successful. Second, participants were asked to describe the details of each engagement from beginning to end. Questions centered on how the salesperson determined the skill sets needed for each customer engagement, the rationale for why each team member was selected over others for participation on the ad hoc team, and the role that timing assumed when deciding when team members were deployed in the selling cycle. Respondents were also prompted to explain the strategies that they used to secure the involvement of key personnel and orchestrate company resources for the customer engagement.

Analysis The 50-to-70-minute interviews were tape recorded and transcribed, producing over 1,000 single-spaced pages of data. Specifically, to determine the processes involved in coordinating expertise among members of an ad hoc team, two coders (who were blind to the study objectives) analyzed the transcribed interviews to capture the coordination strategies used by salespeople in managing 120 customer engagements (60 more successful, 60 less successful).

Coding proceeded in three stages. First, two judges (members of the research team) reviewed the pilot interviews to identify the types of coordination activities involved in coordination of expertise by the salesperson. A coding dictionary was developed. Working independently, the two judges then coded a subset of the transcripts to refine definitions of each coordination activity and ensure all key behaviors were addressed. Finally, the judges then completed the coding of the transcripts, recording if each activity was mentioned in each transcript. The intercoder reliability index was 0.89 (I_r) and exceeds the established benchmark for satisfactory reliability (Perreault and Leigh 1989). All disagreements were resolved by discussion.

Using a grounded theory approach (Glaser and Strauss 1967), we identified the activities or strategies that may distinguish higher- versus lower-performing salespeople. In turn, we explore the degree to which those coordination of expertise strategies differ for successful versus unsuccessful customer engagements. From Table 1, observe that several distinct salesperson coordination strategies emerged: early

Table 1 Coordination of expertise—differences across performance levels*

Salesperson Coordination Activities	High-Performers	Average-Performers	Low-Performers	Chi-Square Likelihood Ratio
Early Customer Contact				
%—Successful engagement	100	70	87	10.68, $p \leq .01$
%—Unsuccessful engagement	68	65	40	n.s., 3.33, $p = .189$
Diagnosed Required Expertise				
Selected at least one team member with relationship with salesperson or another team member				
%—Successful engagement	100	83	87	5.98, $p \leq .05$
%—Unsuccessful engagement	86	61	80	n.s., 4.15, $p = .125$
Selected at least one team member based on customer relationship				
%—Successful engagement	77	57	53	13.95, $p \leq .08$
%—Unsuccessful engagement	36	22	20	10.36, $p \leq .05$
Selected at least one team member based on specific technical skills				
%—Successful engagement	100	96	80	6.15, $p \leq .05$
%—Unsuccessful engagement	100	78	87	7.36, $p \leq .05$
Involved a Project Manager Expert				
%—Successful engagement	77	57	40	5.50, $p \leq .08$
%—Unsuccessful engagement	46	39	27	n.s, 1.38, $p = .502$
Successfully Recruited Needed Experts				
%—Successful engagement	96	44	13	31.17, $p \leq .001$
%—Unsuccessful engagement	41	9	7	9.34, $p \leq .01$
Discerned Time to Deploy Team Members				
%—Successful engagement	64	30	33	5.90, $p \leq .05$
%—Unsuccessful engagement	55	35	7	10.31, $p \leq .01$

*Entries reflect the percentage of salespeople who mentioned the coordination activity

customer contact, diagnosing required expertise, involving a project management expert, successfully recruiting needed experts, and discerning the appropriate time to deploy team members during the sales cycle.

Other measures In addition to the depth interview, participants also were asked to assess the strength of their internal working relationships with ad hoc team members. These measures are described in the Phase II methodology.

Phase I Results

The process of coordinating expertise

Early customer contact Coordination of expertise hinges on the salesperson's knowledge of customer requirements. The salespeople in our study could initiate the customer engagement or be called upon by the product division to engage the customer. From Table 1, observe that 100% of high performers were involved early in successful customer engagements by (1) initiating the contact with the customer or (2) joining the product division at an early point in the customer's buying decision process. Not only do high performers engage earlier in the sales process, but successful engagements, across performance levels, are marked by earlier involvement.

A high performer recounts the way in which delayed involvement in the customer's buying process contributed to an unsuccessful customer engagement:

> *All of the sudden I get a call one day from a technical colleague that said "You've got a meeting today at 4 o'clock. Let's go." I don't even know what went on prior to that. It was a discussion, I think, primarily driven by information tech specialists on the customer side.*

Diagnosing required expertise In designing an ad hoc team, salespeople sought members who possess particular relational or technical capabilities. Preferred members tended to be those who had a relationship with either the salesperson, sales team, or the customer organization. Other team members were chosen based on the match between their technical skills and particular customer requirements. Across performance levels, a high percentage of salespeople select an individual with whom the salesperson or another team member had previously worked. Successful customer engagements tend to involve an ad hoc team comprised of members who have a working relationship history.

The pattern of results suggests that the selection of team members based on customer-related factors, such as whether a team member has a relationship with the customer organization or possesses relationship management skills particularly suited to a given customer's decision makers varies across performance levels and engagement types. In successful engagements, 77% of high performers selected at least one team member because of a customer-related factor, as compared to 53% of low performers. In unsuccessful engagements, the percentages declined dramatically, with only 36% of high performers selecting at least one team member because of a customer-related factor, as compared to 20% of low performers. Why was the engagement successful? A high-performing salesperson observed:

> *The relationship. The relationships that the team has there. Prior business that they had done. Their ability to establish that level of trust with the customer.*

Another high-performing salesperson added Bill to the ad hoc team because his sales approach matched the customer engagement:

> *This was a network project. We had a series of meetings and really went through, "Here are our capabilities. Here's what we can do." Really learning what they needed from us. It was a small law firm that was understaffed and very territorial. They were nervous about bringing someone in to do their work. I knew that in the past Bill worked with customers who had that same type of reaction. I know Bill is good at more of a consultative approach.*

The majority of salespeople selected at least one ad hoc team member who possessed the technical skills that matched customer requirements. High-performing salespeople identified specific technical skills needed by ad hoc team members more often than lower performers who, in many cases, selected individuals by title or general competency. In both successful and unsuccessful engagements, 100% of high performers selected at least one team member based on specific technical skills, while 80% of low performers did so in successful engagements, and 87% in unsuccessful engagements. In selecting a team member for a challenging customer engagement, a salesperson observed:

> *I needed someone with experiences with a large type project with these types of rollouts. This was a bid, and we pretty much knew exactly what the specs were for the customer. It was really all about our technical skills. That was the essence of the solution to the customer—technical sophistication.*

Involving a project management expert A greater proportion of high performers appear to place emphasis on the project management task than low performers. In successful

engagements, 77% of high performers used at least one project manager on the team compared to only 40% of low performers. Recounting a successful engagement, a high performer noted:

> *I needed a good project manager to form a good, strong relationship with the customer because the project manager was going to be the one involved in overseeing and managing the day-to-day contact with the customer and our team.*

A low performer expresses frustration:

> *There is a role I would have liked to have had. I wanted a very strong project manager, and I was unable to find the best fit for the customer. I kind of filled in that role.*

Recruiting needed experts Following the diagnosis of expertise, salespeople were responsible for obtaining the cooperation and commitment from their preferred set of team members to meet the unique requirements of the customer engagement. However, because of involvement with other engagement teams or management's resistance to an assignment request, salespeople must work hard at persuading potential team members to work on their particular engagement. To illustrate, a salesperson described such efforts:

> *We had to make sure that one of the guys I wanted would be ending a project he was involved in, so he would be available to us. We were able to help him get out of that a couple of weeks early so we could get him involved with our team because he was the right person for the job.*

Although a CRM database was available to assist in identifying organizational experts, many salespeople recruited experts through personal connections, word-of-mouth, and formal requests. One salesperson's comments illustrate the combination of approaches that are used:

> *This team was handpicked. I picked Kevin because he had absolutely the specific skills that I needed. I have used Steve on numerous engagements, so I knew him. Ellen came out of a request I made of another division for her expertise.*

For some engagements, study participants remarked that they were unsuccessful at recruiting the experts whom they most wanted. This particular salesperson struggled to locate the expertise needed and simply explained:

> *I could not find anyone that seemed to provide the right fit, so I had to take a few guys off the bench.*

In many cases, the effectiveness of the ad hoc team was compromised because the salesperson was unable to attract the talent required to meet customer expectations. Indeed, 96% of high performers successfully recruited needed experts for successful engagements compared with only 13% of low performers. The results are equally dramatic for unsuccessful engagements.

For a high-opportunity engagement that was lost, a high performer describes the dilemma she faced when assembling the ad hoc team:

> *I hired a project manager from the outside. We had a very tight bench. And looking at the people that were available, there really weren't any real, what I would call, quality project managers available at the time. And I knew that I needed one. This is a very large opportunity at the time. I got his resume and made contact with him. Interviewed him. And once we were awarded the opportunity, I was able to bring him on board to go manage this deal. But I did know in the back of my mind that he didn't have all of the technical expertise that he would need to run this project. So I kind of went out on a limb here by hiring him. But at the time I knew I didn't have many options.*

Similar issues were present in another unsuccessful engagement as detailed by this salesperson:

> *This customer engagement gave me a little bit of heartburn to be quite honest with you. While I was looking to put the team together and I basically had my arms twisted back, I was told, "You'll take someone off the bench." For me, that's a recipe for disaster. And that's exactly what occurred. I had to replace the project manager halfway through the project.*

Deploying the experts Given the often protracted sales cycle involved in complex business-to-business sales, the salespeople in our sample often referred to the importance of "deploying team members at just the right time" during the sales process. For this firm, the length of customer engagements ranged from several months to a year, depending on the size and complexity of the customer solution. Discriminating the point in the selling cycle to deploy each team expert was a theme that emerged from the depth interviews. One salesperson described how she sequenced the introduction of team members across the sales cycle:

> *For this particular customer we started with three project definition workshops. The first two I did by myself where I met with the customer, their project*

manager, and their lead designer. Then when we got down to the details of "Here's what's going to happen daily" that's when I engaged Jim so that we could set the expectations up front. I pulled the project manager in later, and then our tech guys.

Indeed, some salespeople used specific engagement milestones as guideposts for deployment while others described involving certain individuals when the engagement was struggling. Interestingly, however, other respondents were not as sensitive to the timing issue. For instance, this salesperson followed a more immediate and homogeneous approach to expert deployment:

After I met with the customer, I brought in the entire team. Things got off to a slow start.

For high performers, 64% carefully deployed their team members as compared to only 33% of the lower performers (successful engagements). Only 7% of the lower performers used time-sensitive deployment strategies when the engagement was not successful.

Measure of coordination of expertise

The coordination of expertise strategies that distinguish high versus low performing salespeople were used to develop a measure for the coordination of expertise. Using the themes identified in Table 1 and described above, the two coders assigned a "1" if an activity was employed and a "0" if not (Wageman 2001). For example, a score of "1" was assigned if a salesperson initiated contact with the customer. The measure for coordination of expertise ranges from 0 to 6, if all effective coordination actions were taken (early customer contact, selected at least one team member on relational characteristics, selected team member based on technical skills, included a project manager on team, recruited needed experts, and considered appropriate time to deploy experts).

Phase II

Building on our findings in Phase I, we now develop a set of hypotheses that identify the characteristics of a salesperson's internal working relationships as central to explaining the effective coordination of expertise, and explore the relationship between coordination of expertise and salesperson performance. Central to the success of customer engagements that emerged in Phase I was the salesperson's ability to secure access to the right information and gain the support of desired experts. In Phase II, we adopt a social network perspective to shed further light on the internal working relationships that underlie salesperson performance. To this end, we examine the reputation, diversity, and strength of the salesperson's internal relationships.

The salesperson's internal working relationships and coordination of expertise

Reputation of the salesperson's internal relationships Reputation represents the degree to which an entity is held in high regard by others (Weiss et al. 1999). Prominent in business and social psychology research, reputation can attract others to a person or, alternatively, drive them away (Bromely 1993). Kilduff and Krackhardt (1994) found that the reputation an individual possesses for a certain level of performance is guided by two factors: actual job performance and the reputation of those with whom the individual is perceived to be associated. They found that *actual* links with others had no significant impact upon this evaluation; rather it was the *perception* of associations that dominated the evaluation of how well an individual might perform.

Studies in social psychology have demonstrated that the more attracted an individual is to another's personal network of relationships, the more there is a desire to become involved with the person (Parks et al. 1983). A group's reputation can influence how an individual member is perceived by others (Fiol et al. 2001). For example, a person associated with individuals who are trustworthy and established may be similarly perceived because of the association with the group (Dasgupta 1988). A positive reputation of those with whom the salesperson is associated sends a signal to others that the salesperson is a part of a "winning team." In contrast, internal experts may be dissuaded from working with a salesperson who is connected to people with poorly-defined or less favorable reputations.

As revealed in the qualitative phase of this study, salespeople encounter multiple constraints when attempting to coordinate internal resources. Salespeople who have an acute sense of the best team of specialists for a specific customer still must face the issue of whether or not these specialists are available when needed. The best specialists within an organization are frequently those who are fully engaged in multiple projects. Further, organizational experts frequently have discretion over the particular salespeople with whom they work, the ad hoc teams they wish to join, the length of time they are involved, and the degree of effort they exert. We suggest that the positive reputation of the salesperson's internal relationships can draw the interest and participation of internal experts. Further, the positive reputation of the salesperson's internal relationships may promote information-sharing behaviors that better help the salesperson diagnose the customer opportunity and select the necessary expertise for the engagement.

We contend that the positive reputation of the salesperson's internal relationships can both attract others to participate on an ad hoc team, as well as engender the cooperation, motivation, and effort of members once the team is formed. This allows the salesperson to more freely implement coordinating activities. Thus,

> H_1: The reputation of the salesperson's internal relationships is positively related to the coordination of expertise by the salesperson.

Diversity of the salesperson's internal relationships Diversity of internal relations is the degree to which the individuals in the salesperson's network of relationships possess unique skills and knowledge (Mehra et al. 2001). Diverse internal relationships provide the salesperson with access to non-overlapping skills and knowledge from which to form customized teams and assist the salesperson in diagnosing and recruiting additional expertise. A stream of literature in social psychology has demonstrated that diversity of internal relationships is positively related to both individual (Mehra et al. 2001) and group performance, especially with nonroutine, complex problems (Shaw 1976; Wanous and Youtz 1986). Further, as compared to more homogenous connections, diverse relationships within an organization have been found to lead to higher levels of productivity (Reagans and Zuckerman 2001), and greater degrees of creativity (Katz 1982), influencing managerial performance and innovation (Rodan and Galunic 2004). The diversity of the skills within the salesperson's internal social network provides resources that can be used for innovative approaches to customer engagements. The more diverse the skills of the salesperson's internal network, the greater the breadth and depth of talent from which the salesperson can choose to create superior customer solutions. We hypothesize that,

> H_2: The diversity of the salesperson's internal relationships is positively related to the coordination of expertise by the salesperson.

Strength of the salesperson's internal relationships The internal relationships of a salesperson provide the circuits through which critical customer and organizational knowledge can be accessed. We suggest that the strength of these relationships enhances the salesperson's effectiveness at coordinating expertise. The strength of relationships is defined by frequent and important interaction as well as the closeness of the relationship (Brown and Reingen 1987).

As compared to lower performers, higher-performing salespeople embrace relationship building as central to their success in the sales domain (Ustuner and Godes 2006) and, as a result, are likely to form stronger ties within their internal network. The strength of relationships developed by salespeople impacts the breadth and depth of knowledge that the salesperson can access (Hansen 1999). Strong relationships, for instance, allow for the easier transfer of tacit knowledge (Ancona and Caldwell 1992; Hansen 1999). In addition, the information acquired from these relational ties aids the salesperson in coordinating resources for a customer engagement by clarifying "who knows what" within the organization. Frenzen and Nakamoto's (1993) research on the flow of market information found that an individual is more likely to share valued information with a person with whom they have a close, rather than a weak, tie. Strong relations have been found to be positively associated with referrals (Brown and Reingen 1987) and to information acquisition (Rindfleisch and Moorman 2001). Previous research has also found that highly synergistic solutions for the salesperson's firm and the customer's organization result from informal, frequent communication among involved parties (Schultz and Evans 2002). This collection of studies suggests that stronger internal relationships may assist salespeople in determining and acquiring the best resources for a customer engagement. Consequently,

> H_3: The strength of the salesperson's internal working relationships is positively related to the coordination of expertise by the salesperson.

Linking coordination of expertise to salesperson performance

Is coordination of expertise positively associated with salesperson performance? Certainly, in addition to the qualitative insights provided in Phase I, the literature suggests that, indeed, coordination of expertise is related to salesperson performance. The successful execution of sales strategy begins with the identification of customer requirements which, in turn, determines the set of skills that is required to address these needs. In line with research on expert systems (Lado and Zhang 1998; Wichert 2004), diagnosing the expertise that is needed is essentially a problem-solving activity. Team-building research suggests that the key to successful formulation of a new ad hoc team is the determination and selection of "technical and interpersonal skills of potential members" relevant to the task (Mealiea and Baltazar 2005: 142). The diagnosis of the customer problem and the determination of the types of expertise necessary to provide the appropriate solution are critical in guiding the remaining coordination efforts.

In general, the acquisition of knowledge about customers' unique requirements (Slater and Narver 2000) and behaviors aimed at developing and utilizing this knowledge (Sujan et al. 1994) have been positively linked to salesperson performance. This suggests that salespeople who effectively diagnose the expertise needed for a customer engagement

will likely perform better than those with less exceptional skills in this domain. This is further supported by research on project management teams that found greater profitability from project teams that better matched expertise to project requirements (Boh et al. 2007). Inherent in the diagnosis process is a mental-matching of which organizational experts provide the best fit for a particular customer engagement.

For recruiting experts, knowledge about "who knows what" among organizational members enhances a team leader's ability to divide and interrelate project tasks (Hollingshead 2000; Kanawattanachai and Yoo 2007; Moreland 1999). Even with such knowledge, however, Brown et al. (2005: 159) state that the "key internal challenge facing a salesperson consists of obtaining the cooperation of specialists to facilitate the sale."

In terms of deploying the experts, salespeople must determine when in the selling and implementation cycle to elicit the skills of each member of the ad hoc team. While timely assembly of diverse organizational experts has been recognized as a challenge in account management (Quinn 1999), few studies have incorporated the timing dimension in the analysis of ad hoc teams.

Drawing on these research themes, we hypothesize that:

> H_4: Coordination of expertise is positively related to salesperson performance.

The mediating role of coordination of expertise

Does coordination of expertise mediate the association between internal working relationships (network reputation, network diversity, and relationship strength) and salesperson performance? Borgatti and Cross (2003) suggest that a salesperson's network of relationship ties may drive performance because those internal relationships provide the path to the knowledge required to create profitable solutions. As customer knowledge is developed and refined, salespeople forge a new set of internal working relationships and expand the size of their cognitive directories to include experts who can be effectively matched to future customer engagements (Brandon and Hollingshead 2004). Therefore, we propose that:

> H_5: The coordination of expertise mediates the relationship between internal relationships and salesperson performance.

Phase II Methodology

Data collection and sample

Building on the data collected in Phase I, we conducted 30- to 40-minute phone interviews with 17 sales managers who supervised the 60 salespeople involved in the study. Specifically, they assessed the social network characteristics (reputation, diversity) and performance for each salesperson that they managed. Each sales manager provided data on three to four salespeople who participated in the study. Consistent with research in the relationship marketing domain (Palmatier 2008), we collected this data from sales managers to obtain a more objective assessment of each salesperson's network characteristics. Sales managers were responsible for coaching each salesperson and monitoring the financial performance of each customer engagement; they interacted with the salespeople daily. Thus, the sales managers were in a unique position to offer an assessment of the internal relationships of each salesperson.

To validate the nature of this relationship, we measured the relationship strength between the sales manager and each corresponding salesperson. The average relationship strength between the salesperson and sales manager (as assessed by the sales manager) was 3.78 on a 5-point scale, where higher scores indicate stronger relationships. One concern is whether sales managers had stronger relationships with higher performers, thereby unduly influencing the sales managers' ratings. We found no differences in the sales manager-salesperson relationship strength across high, average, and low-performing salespeople (F=0.86, p=.429). These results suggest that sales managers have close relationships with the sampled salespeople and that the strength of the relationship is not tied to performance.

Measures

Recall that as an outgrowth of the Phase I results, we developed a measure for the coordination of expertise. In Phase II, we measured the *reputation of the salesperson's internal relationships* using a scale adapted from Weiss et al. (1999). The sales manager rated the collective reputation of those organizational members with whom the salesperson interacts and has connections using a four-item (e.g., highly regarded, professional, successful, well-established), 7-point scale, where higher scores reflect a more positive reputation (α=.77).

In turn, we measured the *diversity of the salesperson's internal relationships* using a two-item scale adapted from Lewis (2003). The sales manager rated the degree of nonoverlapping, unique knowledge available within the range of organizational members with whom the salesperson associates and consults for information, using a 5-point scale where higher scores reflect more diversity (α=.70).

To measure the *strength of the salesperson's internal relationships*, we used a 3-item scale adapted from Brown and Reingen (1987). For both the successful and unsuccessful engagements, the salesperson rated each ad hoc team member on frequency of interaction (where 5=more

than once a day, 1=less than once a month), closeness of the relationship (5=extremely close, 1=more distant), and importance of interactions (5=very important, 1=not at all important). The mean score across the two ad hoc teams (i.e., the more and less successful engagements) represented the measure of the strength of the salesperson's internal relationships (α=.81).

Salesperson performance was measured using Behrman and Perreault's (1984) 5-item sales performance scale. Specifically, sales managers rated each corresponding salesperson's ability to: generate high-level dollar sales; get involved in engagements with high-profit margins; produce sales or contracts with long-term profitability; exceed sales targets and objectives in territory; and keep abreast of new services and offer these to customers (α=.87). All the measures are listed in the Appendix.

We controlled for the years that the salesperson worked with the company (cf. Weeks et al. 2004) to account for the time that the salesperson had to build and maintain relationships. Table 2 provides the descriptive statistics for the variables included in the study.

Phase II Results

Hypotheses 1 through 3 predict that the salesperson's internal relationships are positively related to coordination of expertise. The internal relationship variables were mean-centered to reduce concerns of multicollinearity (Aiken and West 1991). All three internal relationship variables (reputation, diversity, and strength) were each predictors of coordination of expertise. Salesperson tenure in the firm was controlled for in all tests. Consistent with H1, the reputation of the salesperson's internal relationships is a significant predictor of coordination of expertise (F=6.46, $p\leq$.01, Radj2=.16; β=.50, t=3.29, $p\leq$.01). Turning to H2, the diversity of a salesperson's internal relationships is positively related to the coordination of expertise, supporting H2 (F=3.64, $p\leq$.05, Radj2=.08; β=.47, t=2.31, $p\leq$.05). For H3, the relationship between the strength of a salesperson's internal relationships and the coordination of expertise is significant (F=3.19, $p\leq$.05, Radj2=.07; β=.42, t=2.11, $p\leq$.05).

During the interviews, salespeople described the value of having established relationships with respected colleagues. For example, one salesperson details how the positive reputation of his internal relationships enhances the success of a customer engagement and promotes growth:

> *What I try to do is get some of my "A" team players in there, get them working engagements. Because what happens when the "A" team players I pick come in, they do a good job, people come to see them with ideas for the engagement and get involved too. The customer's people also come in with other things that need to be done and tell the team members. Then we work to build the engagement, and bring in other new people as well. We get known for building and winning these types of engagements.*

H4 predicts that coordination of expertise would be positively related to salesperson performance. To examine this hypothesis, we used GLM univariate analysis, where performance was regressed on coordination of expertise. Controlling for salesperson tenure in the firm and the sales manager for each salesperson, we find, as expected, a significant and positive relationship between coordination of expertise and salesperson performance (F=15.69, $p\leq$.001, β=.45, t=3.96, $p\leq$.001). Strong support was found for H4.

Finally, H5 predicts that the coordination of expertise will mediate the relationship between a salesperson's internal relationships (reputation, diversity, strength) and salesperson performance. To test this hypothesis, we followed the four-step process suggested by Baron and Kenny (1986). First, we have determined that the mediator, coordination of expertise, is linked to the dependent variable, salesperson performance (H4). Second, the analysis requires that the antecedents of coordination of

Table 2 Measure statistics

Measure	Mean	S.D.	1	2	3	4	5	6	7
1. Coordination of Expertise—Overall	3.27	1.19	–						
2. Coordination of Expertise—Successful Engagements	3.83	1.39	.91	–					
3. Coordination of Expertise—Unsuccessful Engagements	2.70	1.27	.89	.62	–				
4. Reputation of Internal Relations	5.42	.95	.38	.36	.33	(.77)			
5. Diversity of Internal Relations	3.52	.74	.30	.36	.17	.31	(.70)		
6. Strength of Internal Relations	3.45	.76	.29	.24	.28	−.08	.25	(.81)	
7. Salesperson Performance	4.38	1.20	.41	.35	.38	.70	.48	.05	(.87)

The coefficient alpha for the multi-item scale is listed on the diagonal, and the intercorrelations between measures are given on the off-diagonal. Correlations≥.25 are significant at $p\leq$.05

expertise, the internal relationship variables, are also related to salesperson performance. Using three independent regression equations, we find that the reputation of the salesperson's internal relationships (F=40.47, $p\leq$.001, β=.77, t=6.36, $p\leq$.001) and the diversity of relationships (F=7.77, $p\leq$.01, β=.68, t=2.79, $p\leq$.01) are positively related to salesperson performance. The strength of internal relationships to salesperson performance link was not significant.

Third, the antecedent variables (internal relationships) must be significantly related to the mediator, coordination of expertise. As revealed earlier, the reputation of the salesperson's internal relationships (H1), the diversity of these relationships (H2), and the strength of these relationships (H3) are linked to coordination of expertise. In the final step, we examine the mediating role of the coordination of expertise on the reputation—performance and diversity—performance relationships. Mediation occurs if the coordination of expertise reduces the impact of the internal relationship variables on salesperson performance to non-significance. We find evidence of partial mediation. We find that both the reputation of a salesperson's internal relationships (β=.64, t=4.85, $p\leq$.001) and the coordination of expertise (β=.21, t=2.05, $p\leq$.05) are significant predictors of salesperson performance. The impact of reputation on salesperson performance is reduced slightly but is still significant. Similarly, the diversity of salesperson relationships (β=.43, t=1.88, $p\leq$.08) and coordination of expertise (β=.38, t=3.25, $p\leq$.01) remain as significant predictors of performance. These results suggest that the reputation and diversity of the salesperson's internal relationships influence the salesperson's performance directly, as well as through a salesperson's ability to coordinate expertise. Table 3 presents the results for the testing of the hypotheses.

Discussion and Implications

While providing a valuable contribution and a rich research tradition, the salesperson performance literature adopts the individual as the unit of analysis but directs little attention to the web of internal working relationships that salespeople activate to acquire customer and competitor information and create solutions for customers. Complex sales situations in the business market spawn the active involvement of multiple participants within the selling organization and multiple decision makers within the customer organization. Assuming a central role in the customer engagement process is the salesperson who diagnoses customer requirements, identifies the appropriate set of internal experts, attracts their participation on the ad hoc team, and then orchestrates the team activities in order to develop a solution that matches the customer organization's goals. Our exploratory study provides a starting point for teasing apart the complex and fluid process of coordination of expertise by salespeople and isolating the characteristics of internal working relationships that drive sales performance.

Our findings suggest that coordination of expertise may encompass several specific salesperson behaviors, including initiating contact early in the customer's buying decision process, matching experts to a customer engagement based on technical as well as relational criteria, successfully recruiting desired experts, incorporating a project manager on the team, and discerning the appropriate time to deploy the team members. During a customer engagement, the results indicate that higher-performing salespeople adopt a more comprehensive set of coordination of expertise strategies than lower-performing sales colleagues. Moreover, as expected, coordination of expertise is positively related to salesperson performance.

In marshalling support and coordinating internal resources for a customer engagement, what sets high-performing salespeople apart? First, compared to lower performers, our findings indicate that higher performers were more likely to consider relational as well as technical skills when identifying the set of internal experts who provide the best match for a particular customer engagement. This finding suggests that higher performers are more likely to recognize nuances of the customer relationship, identify team members who possess the interpersonal skills and technical orientation that best match the culture of the customer organization and the characteristics of key decision makers.

Second, the results also suggest that higher performers—compared to peers—are better able to choreograph the activities of the client management process by determining the most appropriate time and sequence to deploy key members of the ad hoc team during the sales cycle. With a rich tradition in the sales literature (Weitz et al. 1986), past research indicates that an individual's adaptive capacity is an important predictor of performance across a wide spectrum of work domains (Chan 2000). Our research highlights the adaptive skills that salespeople employ within their own organization as they identify, recruit, and deploy an ad hoc team tailored to a particular customer engagement.

Third, higher performers are more successful than their colleagues in recruiting desired ad hoc team members. In addition to understanding "who knows what," success may hinge on the salesperson's ability to persuade the targeted internal experts to join and actively participate on the team. This finding highlights the vital importance of the internal relationship-building skills of successful salespeople. Not only do high performers have ready access to the experts who may be needed to capitalize on a customer opportunity, they are also more successful than their colleagues in

Table 3 Summary of Phase II results

Hypothesis	Variables	Beta	SE	*t*-value, *p*-value
H1 Supported	Reputation of Internal Relations→Coordination of Expertise	.50	.15	3.29, $p \leq .01$
	Control variable: Years with company	.03	.02	1.64, $p = .11$
H2 Supported	Diversity of Internal Relations→Coordination of Expertise	.47	.20	2.31, $p \leq .05$
	Control variable: Years with company	.02	.02	1.19, $p = .24$
H3 Supported	Strength of Internal Relations→Coordination of Expertise	.42	.20	2.11, $p \leq .05$
	Control variable: Years with company	.02	.02	1.08, $p = .28$
H4 Supported	Coordination of Expertise→Salesperson Performance	.45	.11	3.96, $p \leq .001$
	Control variable: Sales Manager	na	na	$F = 8.94$, $p \leq .001$
	Control variable: Years with company	−.03	.01	−2.57, $p \leq .01$
H5 Tests for Mediation	Reputation of Internal Relations→Coordination of Expertise→Salesperson Performance			
	Step 1: Coordination of Expertise→Salesperson Performance	Results confirmed in H4		
	Step 2: Reputation of Internal Relations→Salesperson Performance	.77	.12	6.36, $p \leq .001$
	Control variable: Sales Manager	na	na	$F = 41.81$, $p \leq .001$
	Control variable: Years with company	−.01	.01	−1.10, $p = .28$
Partial Mediation Supported	Step 3: Reputation of Internal Relations→Coordination of Expertise	Results confirmed in H1		
	Step 4: Reputation of Internal Relations & Coordination of Expertise→Salesperson Performance	.64, .21	.13, .10	4.85, $p \leq .001$ 2.05, $p \leq .05$
	Control variable: Sales Manager	na	na	$F = 14.21$, $p \leq .001$
	Control variable: Years with company	−.02	.01	−1.75, $p = .09$
Tests for Mediation	Diversity of Internal Relations→Coordination of Expertise→Salesperson Performance			
	Step 1: Coordination of Expertise→Salesperson Performance	Results confirmed in H4		
	Step 2: Diversity of Internal Relations→Salesperson Performance	.68	.24	2.79, $p \leq .01$
Partial Mediation Supported	Control variable: Sales Manager	na	na	$F = 27.34$, $p \leq .001$
	Control variable: Years with company	−.02	.01	−1.44, $p = .16$
	Step 3: Diversity of Internal Relations→Coordination of Expertise	Results confirmed in H2		
	Step 4: Diversity of Internal Relations & Coordination of Expertise→Salesperson Performance	.43, .38	.23, .12	1.88, $p \leq .08$ 3.25, $p \leq .01$
	Control variable: Sales Manager	na	na	$F = 9.58$, $p \leq .001$
	Control variable: Years with company	−.03	.01	−2.40, $p \leq .05$
Tests for Mediation	Strength of Internal Relations→Coordination of Expertise→Salesperson Performance			
	Step 1: Coordination of Expertise→Salesperson Performance	Results confirmed in H4		
	Step 2: Strength of Internal Relations→Salesperson Performance	−.03	.21	−.15, $p = .88$
Not supported	Control variable: Sales Manager	na	na	$F = 23.07$, $p \leq .001$
	Control variable: Years with company	−.02	.02	−1.39, $p = .17$
	Due to insignificant results in Step 2, test for mediation stops.			

attracting these experts to the ad hoc selling team. Why? Results from Phase II suggest that the reputation of the salesperson's internal network of relationships is positively related to salesperson performance. This finding is in line with past research suggesting that the network to which an individual belongs is a factor in defining an individual's reputation as a good performer (Kilduff and Krackhardt 1994). This formed reputation then influences the attitudes, choices, expectations, and actions of the members within a given social network (Blass and Ferris 2007). Results from

the depth interviews further suggest that successful client engagements enhance the reputation of the salesperson in the organization, thereby strengthening internal working relationships and assuring ready access to an attractive mix of internal experts for future engagements.

Managerial implications

While past research provides rich insights into key account management (Homburg et al. 2002; Workman et al. 2003), our study isolates the way in which the salesperson manages and coordinates the activities of internal experts who assume a vital role in creating a customer solution but over whom the salesperson lacks formal authority. Some key implications for practice arise from the study. First, our exploratory study identifies several key coordination of expertise activities emphasized by high-performing salespeople that managers can use to assess their sales deployment processes. Specifically, sales managers should consider the training and sales support systems that are available to aid a salesperson in (1) diagnosing the skills and expertise a particular customer solution requires, (2) identifying the appropriate internal experts and securing their support, (3) recognizing the distinctive characteristics of customer organizations to facilitate team selection and (4) highlighting the distinctive role that project managers assume in enhancing client management effectiveness. In the organization we studied, salespeople could turn to an organizational resource system to identify appropriate experts and to assess their current work commitments and potential availability. Like Cross and Sproull (2004), however, anecdotally, we found that the formal system was used by salespeople only after they had been unsuccessful in securing team members or referrals from their own personal network. In addition to enhancing the value and usability of formal systems, sales managers should initiate job rotation programs to expand the salesperson's cross-unit relationship ties and knowledge of areas of expertise that reside in the organization.

Second, our results suggest that the best practices of high-performing salespeople can provide a template for improving the client management process for complex sales situations. For example, our depth interviews indicate that high performers make a finer-grained assessment of customer requirements that includes customer-related dimensions such as the culture of the organization, the preferences and personalities of key decision makers with whom team members will interact, as well as key milestones in the buyer-seller relationship history. Such points could be accentuated in sales training and captured where possible in customer relationship management (CRM) systems. High performers also attribute their success to carefully choreographing the activities of key members of the team across the sales cycle. For example, some specialists are best deployed early in the process when contract negotiations are underway. Others may be of use behind the scenes and only deployed to the customer organization as a trouble shooter if things go awry and still others may be best included from start to finish. Such best practices can be used to improve sales protocols and to refine sales training programs.

Limitations and Directions for Future Research

An inherent limitation of our study is the focus on sales personnel from a single organization. This potentially limits the generalizability of the results, but we believe the findings are relevant to any business-to-business firm that uses ad hoc teams for complex selling situations. Moreover, by emphasizing a qualitative research approach, we were able to isolate and more comprehensively explore the intricacies as salespeople assemble and manage ad hoc teams in a dynamic sales context. In support, Jones et al. (2005b: 193) recommend that "more qualitative research would increase our understanding of team selling and its variants. . . ." Further, by restricting the focus to a single firm, the need to control for organization-level variables such as size, culture, and management style is eliminated. Another potential limitation of our study is that salespeople were asked to provide comprehensive descriptions of recent customer engagements after the selling and implementation processes had been completed. While the salespeople had little difficulty in providing detailed accounts of each client engagement, future research might explore the coordination of expertise as the client engagement process is initiated and as the salesperson forms the team. By asking salespeople to describe past versus current customer engagements, details related to the coordination of expertise process may have been omitted.

By isolating the coordination of expertise by salespeople and exploring the way in which coordination activities drive sales performance, our study takes an important initial step toward understanding the internal relationship management skills that define high-performing salespeople. For example, future research might explore the influence strategies that salespeople employ to secure cooperation or resources from other units as well as the relative importance of particular coordination behaviors to successful customer engagements. Likewise, future studies might profitably examine the social network characteristics (e.g., centrality, density) of high- versus low-performing salespeople.

At a fundamental level, can the best practices of high-performing salespeople provide a template for improving the procedures, processes, and organizational routines that encircle customer relationship management? For example, what steps can sales and marketing executives take to enrich the cross-unit connections of account managers and nurture the development of the soft skills and project management skills that are crucial in managing internal

working relationships across multiple customer engagements? In a rapidly changing technological environment, how can management information systems be improved to assist salespeople in locating experts across diverse technical domains and in deploying them for particular customer requirements? In turn, to enhance the preparation of technical experts for customer engagements, how can management information systems be refined to provide the timely flow of relevant customer information to the technical sphere of the organization?

Appendix

Survey Items

Reputation of Internal Relationships (adapted from Weiss et al. 1999; data collected from the sales manager; α=.77)

How do you view those with whom *Salesperson's name* interacts and has connections?

1. 7-highly regarded 1-not highly regarded at all
2. 7-professional 1-not very professional
3. 7-successful 1-unsuccessful
4. 7-well-established 1-not very well-established

Diversity of Internal Relationships (adapted from Lewis 2003; data collected from the sales manager; α=.70)

Each individual typically has a range of others with whom they associate, and often work with and consult for information. Based on what you know about *Salesperson's name* network of relations, how would you rate *Salesperson's name network* (as compared to others) on the following areas? 1=strongly disagree 5=strongly agree

1. The people in *Salesperson's name* network of relations each have knowledge about an aspect of the projects that no other team member has.
2. The people in *Salesperson's name* network of relations have the highest degree of non-overlapping knowledge.

Strength of Internal Relationships (adapted from Brown and Reingen 1987; data collected from the sales manager regarding the relationship with the salesperson; and from the salesperson regarding internal relations; α=.81)

1. How frequently did you interact with [for salesperson: insert name of each member of the ad hoc team listed/ for sales manager: insert name of salesperson]?

   5-more than once a day
   4-four to five times a week
   3-one to three times a week
   2-one to three times a month
   1-less than once a month

2. How close is your relationship with [for salesperson: insert name of each member of the ad hoc team listed/ for sales manager: insert name of salesperson]?

   5-extremely close 1-more distant

3. How important was your interaction with each of these individuals? [for salesperson: insert name of each member of the ad hoc team listed/for sales manager: insert name of salesperson]?

   5-very important 1-not at all important

Salesperson Performance (adapted from Behrman and Perreault 1984; data collected from the sales manager; α=.87)

How would you rate *Salesperson's name* based on long-term performance in the following areas:
7=outstanding, 1=needs improvement

1. Generating a high level of dollar sales
2. Involved in engagements with the highest profit margins
3. Producing sales or contracts with long-term profitability
4. Exceeding all sales targets and objectives in your territory.
5. Keeping abreast of [Company]'s new services and successfully offering these to customers

Coordination of Expertise Index (six activities coded 0 or 1, maximum score possible=6):

- Early customer contact
- At least one team member selected based on relationship with team member
- At least one team member selected based on relationship with employees of customer organization
- At least one team member selected based on technical skills
- Project manager included on team
- Timing of team member involvement considered

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