

Date: June 18<sup>th</sup> 2010



Dear [Senior Manager's name],

### **Improving the realisation of customer value**

I am currently working on a research project to understand better how firms can more fully realise the value of their customers through their salespeople. More specifically, what salespeople do that most effectively helps their firms realise the full value available through relationships. I invite you to participate in this project by directing me to people in your organisation who would be able to help by filling in a questionnaire for this purpose. The results of this research will be published online as a PhD thesis in approximately a year's time.

The project results will be an aid to management and to further research. A common problem for firms is that sales professionals, at all levels, focus on tasks that achieve immediate goals such as getting orders in the next few weeks or months, at the expense of longer-term objectives which require access to, and integration of, the valuable information or other resources available through customer relationships. Examples of these resources are the customers' skills, capabilities, downstream intelligence, new project plans, and customer's investments in the relationship for joint product development. The project will help identify which activities of sales professionals are important to making these valuable resources available.

Will you be able to assist me in this project? If so, I will be very grateful if you can encourage sales professionals such as salespeople and account managers to participate, and assign a person for my further contact or give me a list of the people who would be willing. I will post them the survey package, which will take about 20 minutes to fill in. All information provided by your staff will be kept strictly confidential and responses will be analysed only in aggregate form. If you have any concerns or queries, please feel free to contact me or the Project Supervisor, Dr. Roger Baxter, at 09 9219999 ext 5808, [roger.baxter@aut.ac.nz](mailto:roger.baxter@aut.ac.nz).

Thank you if you can help.

Yours sincerely,

A handwritten signature in cursive script that reads 'Annie Zhang'.

Annie Zhang

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Tel: 09 9219999 ext 5339

Postal: AUT University (D-93)

Private Bag 92006

Auckland 1142

Date: June 18<sup>th</sup> 2010



Dear [sales representatives or account managers],

### **Improving the realisation of customer value**

I am currently working on a research project to understand better how firms can more fully realise the value of their customers through their sales professionals. More specifically, I am researching what salesperson does that most effectively helps his/her firm realise the full value available through relationships. I am using "salesperson" as a generic term for a person who is involved in maintaining and developing a company's customer relationships, going out to the field meeting customers, and has sales targets that he/she needs to achieve.

I invite you to participate in this project by filling in a questionnaire for this purpose. The purpose of this survey is provided in the information sheet enclosed. The questionnaire will take about 20 minutes to fill in. The results of this research will be published online as a PhD thesis in approximately a year's time. By participating in this survey, you will have a chance to win a prize draw of \$100 petrol voucher. Please return the questionnaire before 31<sup>st</sup> of July.

Once you fill in the questionnaire, please indicate your intention to enter the prize draw on the consent form and mail the signed consent form back with the questionnaire in the FreePost envelope provided in this survey package. If you have any concerns or queries, please feel free to contact me or the Project Supervisor, Dr. Roger Baxter, at 09 9219999 ext 5808, [roger.baxter@aut.ac.nz](mailto:roger.baxter@aut.ac.nz).

Thank you if you can help.

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# Participant Information Sheet



## Date Information Sheet Produced:

May 19<sup>th</sup> 2010

## Project Title

The salesperson's role in the realisation of the potential value of a business buyer-seller relationship

## An Invitation

I am Annie Zhang. You are invited to participate in this study, which is a part of a larger PhD study to find the impacts salespeople have on realising the potential value of business customer relationships. Participation is entirely voluntary. You may withdraw at any time prior to completion of this questionnaire without being disadvantaged in any way.

## What is the purpose of this research?

Salespeople play a critical role in realising customer relationships value for the seller. Three key questions are asked in this study: (1) how much effort salespeople devote to a list of sales activities for their customers, (2) whether salespeople have been able to obtain useful ideas or information from their customers or use the customers' resources for creating value for the seller company, and (3) what relationship outcomes are for the seller company. This study will help to test how salespeople's activities influence the availability of the customer's resources as well as the outcome of the relationship for the seller. It also helps to fulfil the requirements of my study of Doctor of Philosophy, and will result in publications in referred research journals and conferences.

## How was I identified and why am I being invited to participate in this research?

Your company has been chosen randomly from a commercial database. You are selected because your company has provided a list of suitable individuals who might be interested in participating in this research and your name was included in the list.

## What will happen in this research?

I have enclosed a questionnaire. I will be very grateful if you can complete this questionnaire and return it to us before July 31<sup>st</sup>. I will then enter your data along with other respondents' data in statistical analysis software and test my hypotheses.

## What are the discomforts and risks?

None.

## What are the benefits?

The study will help to identify what types of sales activities have strong impact on obtaining access to customer's resources that are useful for the seller, and how these activities influence the outcome of the relationship for the seller. Thus, the study can advance the knowledge of the value creation process in the business buyer-seller relationships. Salespeople will then be able to direct their effort more effectively towards the important sales activities. You may choose to enter the draw for a \$100 petrol voucher. Please indicate your choice on the Consent Form enclosed.

**How will my privacy be protected?**

All information you provide will be strictly confidential. The information you provide will be presented only in aggregate after analysis. It will not be released to any third party. The demographic information of your firm that I will ask you to provide at the end of the questionnaire will be used for comparative purposes only.

**What are the costs of participating in this research?**

Nothing, only twenty minutes or less of your time.

**What opportunity do I have to consider this invitation?**

Please return the questionnaire before 31<sup>st</sup> of July if you would like to participate in this research.

**How do I agree to participate in this research?**

I have enclosed the questionnaire, the Consent Form for this research and a pre-paid envelope. Please fill in the questionnaire, sign the Consent Form, and send them back by using the pre-paid envelope provided.

**Will I receive feedback on the results of this research?**

The project will be completed within a year, and the thesis will be available online once it is completed.

**What do I do if I have concerns about this research?**

Any concerns regarding the nature of this project should be notified in the first instance to the Project Supervisor, Dr. Roger Baxter, [roger.baxter@aut.ac.nz](mailto:roger.baxter@aut.ac.nz), 921 9999 ext 5808.

Concerns regarding the conduct of the research should be notified to the Executive Secretary, AUTECH, Madeline Banda, [madeline.banda@aut.ac.nz](mailto:madeline.banda@aut.ac.nz), 921 9999 ext 8044.

**Whom do I contact for further information about this research?*****Researcher Contact Details:***

Annie Liqin Zhang, [annie.zhang@aut.ac.nz](mailto:annie.zhang@aut.ac.nz), 921 9999 ext 5339.

***Project Supervisor Contact Details:***

Dr. Roger Baxter, [roger.baxter@aut.ac.nz](mailto:roger.baxter@aut.ac.nz), 9219999 ext 5808

Approved by the Auckland University of Technology Ethics Committee on 3<sup>rd</sup> of June 2010, AUTECH Reference number 10/113.

# Consent Form



**Project title:** *The salesperson's role in the realisation of the potential value of a business buyer-seller relationship*

**Project Supervisor:** *Dr. Roger Baxter*

**Researcher:** *Annie Liqin Zhang*

- I have read and understood the information provided about this research project in the Information Sheet dated 19 May 2010.
- I have had an opportunity to ask questions and to have them answered.
- I understand that I may withdraw myself or any information that I have provided for this project at any time prior to completion of data collection, without being disadvantaged in any way.
- If I withdraw, I understand that all relevant information will be destroyed.
- I agree to take part in this research.
- I wish to enter the draw for \$100 petrol voucher (please tick one): Yes  No

Participant's signature: .....

Participant's name: .....

Participant's Contact Details (For notifying you the result of the prize draw):

Email: .....

Telephone (This information will only be used if the email cannot be sent through): .....

.....

Date:

**Approved by the Auckland University of Technology Ethics Committee on 3<sup>rd</sup> of June, 2010 AUTEK Reference number 10/113**

*Note: The Participant should retain a copy of this form.*

## The salesperson's role in the realisation of the potential value of a business buyer-seller relationship



Thank you very much for completing this questionnaire. Please choose **the fourth largest** business customer in terms of revenue among the customers you look after when you answer the questions. If you have less than four business customers, please choose the one who provides the lowest revenue for your company. Please indicate your choice by **circling** the appropriate number from 1 to 7.

How much effort have you devoted to the following activities for your chosen customer compared to other customers?	Very little amount	Very large amount
Improving your understanding of your company's products/services for serving this customer	1 2 3 4 5 6 7	
Improving your understanding of your company's capabilities/resources for serving this customer	1 2 3 4 5 6 7	
Keeping abreast of the developments in the industry in which your company operates for serving this customer	1 2 3 4 5 6 7	
Keeping abreast of the developments in the industry in which this customer operates	1 2 3 4 5 6 7	
Understanding this customer's business, such as their goals and objectives	1 2 3 4 5 6 7	
Understanding this customer's long-term needs	1 2 3 4 5 6 7	
Understanding how value is created for this customer through the use of your company's offering	1 2 3 4 5 6 7	
Understanding the individuals you are dealing with in this customer's organisation, such as their roles in their organisation, how they think, make decisions, and do their jobs	1 2 3 4 5 6 7	
Understanding the feelings people within this customer's organisation have about your company's relationship with their company	1 2 3 4 5 6 7	
Understanding the factors outside of your main contacts' control that can affect buying decisions within this customer's company	1 2 3 4 5 6 7	
Building strong relationships with multiple individuals within this customer's company	1 2 3 4 5 6 7	
Building strong working relationships with other people in your company for serving this customer	1 2 3 4 5 6 7	
Building strong working relationships with people in other relevant third party companies for serving this customer	1 2 3 4 5 6 7	
Keeping in regular business contact with multiple individuals within this customer's company	1 2 3 4 5 6 7	
Socialising with your main contacts within this customer's organisation	1 2 3 4 5 6 7	
Checking on whether this customer is satisfied with the overall offering you've provided to them	1 2 3 4 5 6 7	
Providing prompt service in response to this customer's requests	1 2 3 4 5 6 7	
Supplying information to this customer in a timely manner	1 2 3 4 5 6 7	
Forecasting the profit from this customer for your company	1 2 3 4 5 6 7	
Analysing this customer's product use experience to identify new product/service ideas	1 2 3 4 5 6 7	
Identifying this customer's new needs through careful listening or observation during customer visits	1 2 3 4 5 6 7	
Identifying new business opportunities through thinking about how things can be improved in the relationship	1 2 3 4 5 6 7	
Identifying this customer's new needs or new business opportunity for the relationship through discussion with this customer	1 2 3 4 5 6 7	

Clarifying this customer's real requirements through correct questioning	1	2	3	4	5	6	7
Trying to find out which kinds of products/services would be most helpful to this customer	1	2	3	4	5	6	7
Generating creative solutions for this customer	1	2	3	4	5	6	7
Planning on how to approach the selling situation when new business opportunities are identified	1	2	3	4	5	6	7
Considering how to communicate to the customer in a way that they can understand	1	2	3	4	5	6	7
Clarifying the benefit of your offering for this customer	1	2	3	4	5	6	7
Obtaining your company's resources for serving this customer's needs	1	2	3	4	5	6	7
Persuading your managers to invest in this customer relationship	1	2	3	4	5	6	7
Discussing selling strategies for this customer with people from various departments in your company	1	2	3	4	5	6	7
Planning the objectives to be reached with this customer	1	2	3	4	5	6	7
Making sure that the objectives are shared among the relevant individuals within your company, this customer's company, and the relevant third party companies	1	2	3	4	5	6	7
Making sure that the arrangements as per the objectives between the relevant parties are carried out	1	2	3	4	5	6	7
Working very closely with other employees in your company or in other third party companies to ensure the satisfaction of this customer	1	2	3	4	5	6	7
Coordinating very closely with other employees in your company or in other third party companies to solve post-sales problems for this customer	1	2	3	4	5	6	7
Managing the cost for serving this customer's needs	1	2	3	4	5	6	7

<b>To what extent has your chosen customer provided your company the following?</b>	<b>Not at all</b>		<b>A very large amount</b>				
Information that is useful for identifying and addressing their needs	1	2	3	4	5	6	7
Expertise that is useful for developing business with your company	1	2	3	4	5	6	7
Innovative ideas that are useful for developing business with your company	1	2	3	4	5	6	7
Investments that are needed specifically for doing business with your company, e.g., staff training, or adaptations in their systems or procedures	1	2	3	4	5	6	7
Joint work with your company on issues such as product development, cost-cutting, long-range plans, or staff training	1	2	3	4	5	6	7
The physical facilities, equipment or materials that are needed for doing business with your company	1	2	3	4	5	6	7
Money that is needed for doing business with your company	1	2	3	4	5	6	7
Organisational capital resources that are useful for your company, such as their databases, technology, market information, or brands	1	2	3	4	5	6	7
Relationships with other third parties that are useful for your company	1	2	3	4	5	6	7
Future developmental plans that may lead to future selling opportunities for your company	1	2	3	4	5	6	7

<b>How well does the relationship with the chosen customer provide the following outcomes for your company, compared to the outcomes your company gets from other customer relationships?</b>	<b>Poor</b>							<b>Excellent</b>
Meeting sales targets and objectives	1	2	3	4	5	6	7	
Improving your company's share of this customer's business	1	2	3	4	5	6	7	
Making sales to them from multiple product or service divisions	1	2	3	4	5	6	7	
Making high margins	1	2	3	4	5	6	7	
Improving the economic use of your firm's resources	1	2	3	4	5	6	7	

<b>To what extent has your company been able to obtain the following relationship outcomes?</b>	<b>Not at all</b>							<b>To a very high degree</b>
Obtaining new customers through the use of this customer's brands	1	2	3	4	5	6	7	
Obtaining new customers through the leads or references given by this customer, or this customer's introduction	1	2	3	4	5	6	7	
Establishing broader useful networks through this customer's help	1	2	3	4	5	6	7	
Enhancing your company's reputation through dealing with this customer	1	2	3	4	5	6	7	

<b>To what extent has your company been able to gain value, such as obtaining new customers or develop new business, through the following?</b>	<b>Not at all</b>							<b>To a very high degree</b>
The new solution ideas created through dealing with this customer	1	2	3	4	5	6	7	
The products or services that have been improved through dealing with this customer	1	2	3	4	5	6	7	
The new products or services developed through dealing with this customer	1	2	3	4	5	6	7	
The new knowledge learned through dealing with this customer	1	2	3	4	5	6	7	

<b>People in this customer's company believe that...</b>	<b>Strongly disagree</b>							<b>Strongly agree</b>
...you do your job with integrity.	1	2	3	4	5	6	7	
...you will not undertake any actions to harm their company's interests.	1	2	3	4	5	6	7	
...you can be trusted to get the job done right.	1	2	3	4	5	6	7	
...you could be trusted to make emergency decisions, if they could not be reached.	1	2	3	4	5	6	7	

<b>How would you rate the information exchanged with your chosen customer in terms of its ...</b>	<b>Poor</b>							<b>Excellent</b>
...relevancy to value co-creation in the relationship, compared to the information exchanged with other customers?	1	2	3	4	5	6	7	
...timeliness, compared to the information exchanged with other customers?	1	2	3	4	5	6	7	
...completeness, compared to the information exchanged with other customers?	1	2	3	4	5	6	7	

<b>Please consider the following statements as they apply to your chosen customer relationship:</b>	<b>Strongly disagree</b>						<b>Strongly agree</b>
Your products/services are a very important purchase for this customer's organisation.	1	2	3	4	5	6	7
As a portion of this customer's total buying responsibility, your products/services represent a large percentage.	1	2	3	4	5	6	7
Your products/services represent a major financial commitment for this customer's organisation.	1	2	3	4	5	6	7
Compared to other purchases, your products/services require higher-level purchase approval.	1	2	3	4	5	6	7
The purchase of your products/services greatly influences other aspects of this customer's organisation.	1	2	3	4	5	6	7
Most buyers would say that the products/services you sell to this customer are technically complex.	1	2	3	4	5	6	7
The products/services you sell to this customer are relatively simple for most buyers to understand.	1	2	3	4	5	6	7

<b>With this chosen customer, how would you rate the following?</b>	<b>Much lower than average</b>						<b>Much higher than average</b>
Compared to other customers you look after, the potential size of the business with this customer is...	1	2	3	4	5	6	7
Compared to other customers you look after, the opportunity to sell to this customer is...	1	2	3	4	5	6	7
For how many years have you had the relationship with this customer?	..... Years.....Months						
For how many years has your company had the relationship with this customer?	..... Years .....Months						
Which industry type are they in? (Please tick one or more boxes)	<input type="checkbox"/> Manufacturing <input type="checkbox"/> Service <input type="checkbox"/> Agriculture <input type="checkbox"/> Others						
Approximately how many employees does this customer have? (Please tick one box.)	<input type="checkbox"/> 20 or less <input type="checkbox"/> 21 to 50 <input type="checkbox"/> 51 to 100 <input type="checkbox"/> 101 to 250 <input type="checkbox"/> Above 250						

Approximately how many employees does your company have? (Please tick one box.)	<input type="checkbox"/> 20 or less <input type="checkbox"/> 21 to 50 <input type="checkbox"/> 51 to 100 <input type="checkbox"/> 101 to 250 <input type="checkbox"/> Above 250						
Please circle the number that best shows the mix of products and/or services your firm offers:	<div style="display: flex; justify-content: space-between; width: 100%;"> <span>Only products</span> <span>An equal product/service mix</span> <span>Only services</span> </div> <div style="display: flex; justify-content: space-around; width: 100%; text-align: center;"> <span>1</span> <span>2</span> <span>3</span> <span>4</span> <span>5</span> <span>6</span> <span>7</span> </div>						
Annual revenues of your firm in New Zealand - please tick one box:	<input type="checkbox"/> \$5 million or less <input type="checkbox"/> \$5,000,001 - \$10,000,000 <input type="checkbox"/> \$10,000,001 - \$50,000,000 <input type="checkbox"/> \$50,000,001 - \$100,000,000 <input type="checkbox"/> Over \$100 million <input type="checkbox"/> Prefer not to say						
How many years of sales experience have you had in your company?	.....Years .....Months						
How many years of experience have you had in selling the products/services you are selling?	..... Years ..... Months						
Your job title is:	.....						