

The evolution of the seven steps of selling

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Abstract

The traditional seven steps of selling is perhaps the oldest paradigm in the sales discipline. The seven steps model has served as a basic framework in sales training, personal selling textbooks, and teaching personal selling classes. Very little has changed in this framework since the turn of the 20th century. This article reviews the traditional seven steps of selling, examines transformative factors that have led to changes in each step, and presents an evolved seven steps process. While the traditional seven steps reflected a selling orientation on the part of a firm, the evolved selling process reflects more of a customer orientation in that the focus is on *relationship selling*—that is, securing, building, and maintaining long-term relationships with profitable customers.

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1. Introduction

The profession of selling has a rich history that traces its roots back to the ancient world, gained prominence in the early 20th century, and continues to evolve as we move into the beginnings of the 21st century (Hawes, Anne, & Midmier, 2004; Powers, Koehler, & Martin, 1998; Powers, Martin, & Daniel, 1987). Review of these historical perspectives reveals distinct differences in the importance of selling to the overall economy and to the development of both the marketing and sales disciplines, particularly in light of changes in economic conditions (Wotruba, 1991). Business in the 20th century progressed through various eras popularly portrayed as beginning with the production era, followed by the sales era, and the marketing era (Dawson, 1970). Selling or the philosophy of selling is depicted as different in each of these eras, resulting in changes in the salesperson and the sales discipline through the three evolutionary stages.

Throughout modern selling history, one of the oldest and most widely accepted paradigms in the sales discipline is commonly referred to as the “seven steps of selling” (Dubinsky, 1980/1981). These seven steps present the typical sales scenario as composed of the following: (1) prospecting, (2) preapproach, (3) approach, (4) presentation, (5) overcoming objections, (6) close, and (7) follow-up. Ever since selling began to be recognized as a professional discipline, the seven steps have served as a foundation in sales training for the process of making a sale, as well as a framework for teaching personal selling classes (Hawes et al., 2004). Current personal selling textbooks commonly base the organization of the book around some form of these basic steps (Futrell, 2002; Manning & Reece, 2001; Weitz, Castleberry, & Tanner, 2001).

The seven steps of selling is one of the most widely accepted tenets in the sales field, and can be found in early sales books and periodicals. For example, a 1920 sales training book titled *How to Increase Your Sales* lists the “six” steps of selling as (1) find the prospect, (2) preapproach, (3) approach, (4) the demonstration, (5) the argument, and (6) the close (*How to Increase Your Sales* 17th ed.). The only traditional selling step not mentioned is the “follow-up,”

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which is a more recent addition. For at least 80 years, the steps in a selling process have remained virtually the same.

Over time, effective selling methods have evolved from closed, forceful techniques to more of a relationship selling approach (Schurr, 1987). Relationship selling involves securing, developing, and maintaining long-term relationships with profitable customers (Johnston & Marshall, 2005, p. 5). Several behavioral forces are having a major impact on shifting selling to a more relationship-based approach. Rising customer expectations, consumer avoidance of buyer–seller negotiations, expanding power of giant retailers, globalization, and demassification of domestic markets are radically changing the way salespeople perform their jobs (Anderson, 1996).

In today's world of selling, world firms focus on the strategic use of the sales organization with an emphasis on the selling mission rather than just maintaining a sales force (Leigh & Marshall, 2001). The sales organization has a variety of selling methods to employ, the "selling mix." The mix includes traditional field sales forces but also includes other methods of selling, such as teleselling, national account representatives, part-time sales forces, Internet selling, and selling through the use of partners (Cardoza & Shipp, 1987; Marshall, Moncrief, & Lassk, 1999).

Technology, a changing customer base, new selling tools, and globalization all have had a major influence on the salesperson of today. Certainly, changes have occurred in the day-to-day job. Marshall et al. (1999) tracked the daily activities of salespeople and compared them to activities collected in 1981 by Moncrief (1986). Their results show that the majority of 1981 activities were still being performed. However, they also found 49 new sales activities, many of which revolve around new philosophies of selling (consultative selling, adaptive selling, value-added

selling, relationship selling, etc.). They produced a 10-cell grid depicting these activities based on technology (or nontechnology), which is shown in Table 1. The authors conclude that the sales job has experienced significant job enlargement with an increase of job activities required to support successful performance.

The above evidence is compelling that the field of selling has evolved over the past century, with particularly high impact changes in the most recent decade (for an enlightening assessment of selling as a profession, see Hawes et al., 2004). Concurrently, sales organizations have changed and continue to evolve. And of course, the salesperson him-/herself has also changed over time, including increased diversity and globalization in general. Today's professional sales force is better educated with most having a college degree and many having graduate degrees. New philosophies of selling dominate, with emphasis on relationships. Given such dramatic evolution in the sales field, it is odd that, if the sales textbooks represent reality, one tenet that gives the appearance outwardly of having changed little is the seven steps of selling. In fact, the steps are still widely cited in textbooks and form the basis for much sales training. However, is the anchoring of selling as a discipline on the seven steps model still appropriate? We argue that various transformative factors have impacted the steps in recent years, and present an evolved selling process that better reflects practice today.

2. Traditional seven steps of selling

This section briefly reviews the historical seven steps of selling and some of the topical discussion of each selling step that one might find in most any sales textbook.

Table 1
New selling activities

| | Communication | Sales | Relationship | Team | Database |
|---------------|--|---|---|---|--|
| Technology | Email, dictaphone, Internet, laptops ^a —CD ROM, voice-mail, fax, cellular phone, pager, Web page ^a , newsletters, audio–video conference, provide technical info., overnight services, maintain virtual office | Set up appointments, script sales pitch from database, use software for customer background, laptop for presentation ^a , VCR for presentation, provide technology, ability to customer | Web page ^a | Conference calls | Collect new information from database, enter information/data on laptop ^a , update customer files |
| Nontechnology | Practice language skills | Adaptive selling, conduct research at customer's business, avoid potential litigation, plan for multiple calls to close deal, sell value-added services, respond to referrals, write thank-yous ^a , target key accounts, pick up sales supplies, consultative selling, listen, ask questions, read body language, sell unique competencies | Bring in vendor/alliance, develop relationship, hand-hold customer, write thank-yous ^a , purchase dealers, call on CEOs, build rapport with buying center, network, build trust, train brokers | Mentor, make sale and turn it over to someone else, coordinate with sales support | |

Source: Marshall et al. (1999).

^a Appears in more than one cell.

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