Increasing Key “Sales Related” Behaviors through the Use of a Self-Monitoring Checklist

O'Brien
The present study investigated the effects of self-monitoring alone to increase targeted key sales related behaviors with an outside sales representative. The data collected over a five-month period of time revealed a temporary increase in the overall percent of targeted behaviors performed on each sales call when self-monitoring was implemented. Performance dropped to baseline levels near the end of the first treatment phase prior to the reversal phase. The data were inconsistent across behaviors as to whether implementing self-monitoring caused them to change in the desired direction or not. Additional measures which were not directly influenced by the self-monitoring technique were presented to show trends in sales data as the study was being conducted. Those measures included: total gross sales per month, total sales by month per representative, and total commissions earned by sales representative per month.
ACKNOWLEDGEMENTS

I would like to thank both the organization and the individuals who were involved in this experiment for their part in helping to collect and record data. Their input was necessary for the completion of this project.

I would like to acknowledge and thank my committee members for their expert advice and constructive criticism.

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A very special thanks goes to my parents, family, and friends for their love and support.

I am honored and pleased to dedicate this project to them.

Susan M. O'Brien
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INCREASING KEY "SALES RELATED" BEHAVIORS THROUGH THE USE OF A SELF-MONITORING CHECKLIST

Western Michigan University M.A. 1986

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CHAPTER I

INTRODUCTION

Various treatment packages which include a self-monitoring component have been applied as a treatment technique in industrial-organizational settings and have been found to increase sales service behaviors (Komaki, Blood, & Holden, 1980; Troy, 1983; Warren, 1978); increase time spent working (Lamal & Benfield, 1978); increase staff performance (Bacon, Fulton, & Malott, 1982); and to reduce tardiness (Gaetani, Johnson, & Austin, 1983; Lamal & Benfield, 1978). Self-monitoring as part of a treatment package has also proven to be effective in altering the response rate of other targeted behaviors in various applied settings: to decrease talkouts with an elementary student in the classroom (Broden, Hall, & Mitts, 1971); decrease smoking of college students (McFall, 1970); and to decrease multiple tics with an eighteen-year-old male (Thomas, Abrams, & Johnson, 1971). These treatment packages have not yet been dismantled to determine the impact of self-monitoring alone as a treatment technique to increase key sales related behaviors with an outside sales representative.

"In nearly all sales situations some sales performers outperform others by nearly a 10-to-1 margin" (Feeney, 1982, p.1). This huge potential for improved performance in the sales field indicates that some performers are doing something constructive that the low performers are not doing or that low performers are doing something
destructive. The difference in performance levels also indicates that a huge potential dollar return could be gained if all sales people had the knowledge and behavior of the top sales performers.

One way to identify whether or not one is performing a constructive or destructive sales techniques is to observe one's own behavior. This is a common event and many sales people and sales managers think they know what these key sales behaviors are and whether or not they are performing them. However, few of them have studied the sales process in a scientific or systematic fashion and they often selectively remember certain things and forget many others (Feeney, 1982).

In order to change the performance level of the "ones" to that of the "tens," the key sales related behaviors of the top performers need to be identified and a method needs to be employed that will increase the likelihood that the low performers will perform those key behaviors during their sales calls. To identify what the key sales behaviors are, Mirman (1982) states that top performers should be observed on a sales call and the things which they do need to be recorded and behaviorally defined. He calls this breaking down a sales call and defining of behaviors, "a sales action picture." Feeney (1982) stated that there are somewhere around 500 sales related behaviors performed on a typical sales call from the moment the sales person greets the customer until the sales person walks out the customer's door. Based on observations of top sales performers, he also stated it appears that they follow a pattern of performing key sales behaviors on a consistent basis on every sales call whereas
low performers only perform the key sales related behaviors 25% of the time and without a consistent pattern on each sales call.

The key sales behaviors or behavioral categories are defined differently by various researchers. Mirman (1982) noted that the ten key categories for sales related behaviors are as follows:

1. Greeting customer
2. Determine needs
3. Show specific merchandise
4. Sell benefits
5. Overcome objections
6. Closing the sale
7. Suggest additional merchandise
8. Maintain customer self-esteem
9. Compliment customer choice
10. Speed and efficiency of sale

Crawly, Adler, O'Brien, & Duffy (1982) observed top sales performers and identified eight key behavior categories:

1. Greeting the Customer
2. Identifying Customer Needs
3. Matching Needs and Benefits
4. Overcoming Objections
5. Locating the Decision Maker
6. The Close
7. Results of the Sale Contact
8. Follow-up
Feeney (1982) described three key selling behavioral categories as follows:

1. Identification of both customer's product and personal needs.
2. Questions the customers to get as much information as possible on their view of the product.
3. Reinforcement of any positive points expressed by the customer about a particular product.

Troy (1983) chose to look at eight categories of sales service behaviors:

1. Appropriate approach
2. Customer greeting
3. Courteous
4. Helpfulness
5. Appropriate Question
6. Ringing up of sale
7. Neat appearance
8. Wearing an identification tag

Unlike Feeney (1982) and Mirman (1982), Troy (1983) did not obtain a list of key sales service behaviors by observing a top sales performer. He selected four of the behavior categories from Brown, Malott, Dillon, and Keeps (1980) and the remaining four were selected by management at the site where the study was conducted. They were chosen as key behavioral categories specific to this company's rules and procedures for employees.
Low performers may not have been trained in identifying what the key sales behaviors are or possibly they may not be receiving specific feedback on their performance. Brown et al. (1980) looked at sales training and feedback on four key sales behaviors for three sales representatives and found that there was a 9.6% increase above baseline in the key sales behaviors following training and a 35% increase above baseline for performance when daily feedback was implemented. It was also found that during the feedback phase, one sales person, who had not gone through the sales training program as part of the study but did receive training in customer service when he was first hired, had a performance increase in the same amount as the other sales persons. From a cost point of view, it appears as though a feedback system alone may provide a greater return on invested dollars than a training program alone.

The process of developing a feedback system has several steps. Rackham and Morgan (1977) suggest that a behavioral analysis of the sales call be conducted to identify the key sales related behaviors specific to that industry, sales region, product, etc. as these specific key sales behaviors may vary for different situational characteristics. Second, a measurement system for those behaviors should be developed to enable outside sales representatives to receive immediate feedback on their performance by recording the occurrence of the behavioral responses on the measuring device immediately following the responses or immediately after the sales call. Mirman (1982) calls this procedure a "Post-call learning cycle." This information which sales people obtain can be used by
sales managers to give praise for specific performance levels. This "Post-call learning cycle" has been found to increase and sustain sales (Mirman, 1982, p. 429). Feeney (1982) introduced a similar program entitled "Guide to Action" at Emery Air Freight in which sales personnel were instructed to work toward a targeted observable action on the part of their customer. An observable action was defined as a phone call to a supervisor, the placement of an order, or calling in an assistant to discuss a proposal. Following "Guide to Action" training, Emery sales personnel attained an observable action on sales calls 100% of the time.

Following the recording process, the data obtained can be used to determine sales representatives' areas of behavior deficits. The sales representatives may either receive training if the behavior deficits are caused by a knowledge deficit or a contingency system may be set in place if the behavior deficits are caused by a motivational deficit.

Feedback is defined in Functional-Operational terms by Peterson and Fulton (1983) as performance information which is:

1. External
2. Displayed in some way over time
3. Related to some parameter of the response
4. Response modifying or response maintaining over time

Self-monitoring is a form of feedback that provides information back to the performer on his or her performance and allows him or her
to compare it to his or her own personal or set standards (Kazdin, 1980).

Self-monitoring is defined by Mahoney and Thoresen (1974) as:

1. Observing one's own behavior.
2. The monitoring of one's own public behavior or private events.
3. The reporting of these events.

Thoresen and Mahoney (1974) operationally define self-observation in two parts: (1) some type of discrimination is made and the individual must discern the presence or absence of a particular response; and (2) the discrimination must be followed by some kind of recording procedure so that the occurrence of the behavior can be viewed in a systematic fashion. Translating the self-recorded data into some form of visual display may set the occasion for responses that may be followed by a reinforcing consequence from the environment.

The existing data on self-monitoring suggests the following tentative generalizations (Thoresen and Mahoney, 1974):

1. Individuals are not naturally accurate observers.
2. The accuracy of self-recorded data varies dramatically across subjects, situations, behaviors, and recording systems.
3. As a measurement device, self-observation represents a crucial preliminary stage in successful self-regulation.
4. As a treatment technique the effects of self-observation are often variable and short lived.
5. The use of explicit goals may or may not enhance the effects depending on the nature of the behavior and the goals adopted.

Studies looking at self-monitoring as the major independent variable in treating some type of behavior change are not numerous. Most studies looking specifically at self-monitoring as the independent variable have confounding effects from external reinforcement, instructions, demand characteristics, experimental reactivity, and expectancy effects (McFall, 1970; Jeffrey, 1974).

McKenzie and Rushall (1974) conducted a study focusing on the effects of self-recording on the attendance behavior of a competitive swimming team. A multiple baseline design was employed to test how publicly marking attendance at practice affected absenteeism, tardiness, and leaving early. The results of the study revealed a 45% decrease in absenteeism, a 63% reduction in late arrivals, and early departures were completely eliminated. The results were shown to have lasting effects as indicated by post checks. These results may have been confounded by public posting.

In a second study by McKenzie and Rushall (1974) the work rates of eight selected swimmers were increased by an average of 27.1% when program boards were instituted. Swimmers publicly recorded each training unit of work completed and the swimming environment began to be more productive. These results may also have been confounded by public posting of data. Post checks were taken on five days following the study which revealed that the use of program boards had somewhat lasting effects.
In a study to examine how self-monitoring affected job tardiness and percentage of time spent working by a draftsman, Lamal and Benfield (1978) employed a multiple baseline design. Baseline data were collected on arrival time for ten days and for the percentage of time spent working for 15 days. On day eleven, a self-recording time sheet was administered so the draftsperson could record arrival time, the time he left for lunch, the time he returned from lunch, and the time he left work each day. On day sixteen he was instructed to record time spent on each job. During baseline, the subject's mean arrival time was 10:45 a.m. The mean arrival time was nearer to 8:15 a.m. when self-recording of arrival time was implemented. In the follow-up check, mean arrival time was 8:10 a.m. Baseline data showed the percent of time spent working for the subject to be 50.59%. With self-recording implemented the mean percent of time spent working improved to 84.61%. The follow-up check revealed that the subject spent 88.33% of the time working. This study revealed a clear positive effect of the treatment strategy. It was also noted that the time and cost of preparing the recording sheets was minimal relative to the benefit obtained.

Forbes (1982) studied the use of a job model, self-recording, and performance information to reduce performance deficits of relief employees who operated a group home for developmentally disabled adults. These job aid components were implemented as an alternative to on-site supervision. Overall performance levels increased a mean average of 35.8 percentage points above baseline after job models were implemented. They increased again a mean average of 5.85
percentage points above the first condition when self-recording and feedback were implemented.

One of the research goals of Forbes' (1982) study was to test whether generalization occurred from performance accomplishments targeted by the intervention to accomplishments not targeted. While using partial job models, performance improved or maintained for five of six non-targeted accomplishments. This study allowed supervisors to attain substantial increases in employees' performance without allocating additional resources, or additional supervisory time.

Bennett (1982) examined the differential effects of three job-related manipulations on task performance of theatre employees. A task checklist was employed which involved self-recording, accuracy monitoring, and performance monitoring. The study design was multiple baseline across tasks.

The baseline level for employee task performance for all tasks averaged together was 48%. When checklists were implemented, the mean performance increase was 18%. When self-recording and supervisory comments were introduced, performance increased an additional 8% and employee performance averaged at 92%.

For the accuracy check, the employee self-recorded his or her performance on a checklist and a manager also recorded the employee's performance on a checklist. Recording discrepancies defined as the difference between a management recorded percentage and an employee self-recorded percentage for a given work day served as the measure to evaluate self-recording accuracy. These results were looked at on
During condition 1 when checklists were implemented, the mean employee recording discrepancy was 31%. The discrepancy ranged from a low of 24% to a high of 41% per employee. During condition 2, when employees received recording accuracy feedback periodically following self-recording, the mean employee recording discrepancy was 13%. The mean employee discrepancy during condition 2 ranged from 9% to 15% per employee. During condition 3, both a 95% performance standard and performance feedback were implemented, and the mean employee recording discrepancy dropped to 7%.

The study revealed that employee self-recording is most accurate when accuracy contingencies are applied and less accurate when no accuracy contingencies are applied. Employee performance may increase significantly when task checklists are implemented, and performance may increase even more when self-recording feedback is implemented and performance standards and performance feedback are introduced.

Warren (1978) conducted a study observing the results of implementing training and feedback in a retail department store on the percent increase in the average dollar amount of sales for each sales person. A baseline measure was obtained and then followed by training in "add ons" and "suggestive selling". The sales manager administered feedback by totaling and averaging daily sales slips for each sales person and returning the results in graphic form to each of them individually.
The self-monitoring feedback component consisted of each sales person circling the total on sales receipts that were above baseline level. Praise and reinforcement were also part of the treatment package in this study which yielded a 20% improvement in the average dollar amount of sales within five weeks and these results were maintained for as long as the data were tracked.

Troy's (1983) study examined how self-recording affected sales service behaviors. A multiple baseline with a reversal design was employed with three part-time retail sales personnel. Baseline data were obtained on 8 targeted behaviors over a 30-day period by the experimenter. Overall performance measures were also recorded. An observer completed a checklist on interactions between the sales person and a customer during observation sessions. Reliability measures were obtained by having a mystery shopper observe and record data on interactions. The results obtained were compared to the observer's data. The treatment package consisted of training the sales representatives in selling and in the targeted behaviors. They also received materials on store policy and customer service policy. All three subjects received training prior to any subjects starting self-recording. Subject #1 began self-recording following training on day 31. Subjects #2 and #3 began self-recording on day 71 and 81 respectively. During baseline, a mean average for all three subjects of 71.8% of the targeted behaviors performed was obtained. Subject #1's mean average increased to 99.2% of targeted behaviors performed when self-recording was implemented while Subject #2 and #3 (who had only received training) increased to a mean average of 89.6% of
targeted behaviors performed. When Subjects #2 and #3 began self-recording, their mean average increased to 99.7% of target behaviors performed. On day 100, the checklists were withdrawn and Subject #1's mean percentage decreased to 91.5%. Subjects #2 and #3's mean percentage decreased to 89.3%. On day 110, the checklists were reimplemented and the mean average of subjects 1, 2, and 3 increased to 99.8%. On day 130, the checklists were withdrawn again and the mean average for the group decreased to 88.9%.

In the present study, the author investigated self-monitoring using a yes and no checklist measurement system to increase an outside sales representative's key sales related behaviors. A single-subject ABAB design was employed over a five-month period of time from February through June, 1985.

The author chose not to develop the checklist of key sales related behaviors and outcomes by observing the top sales performer. It was not carried out this way for two reasons particular to this study:

1. Although one of the two sales representatives clearly showed a greater monthly dollar volume and greater monthly commissions, her greater sales volume may have been due not to more effective sales behaviors but to factors such as: a larger territory, more time with the company, larger buying power customers, and a more established customer list.

2. The figures which showed that one sales representative had both greater monthly sales dollar and greater monthly commissions
earned over time also showed that for the same representative, both of these measures were falling off consistently over time and becoming more near the other representative's figures. This led the author to believe that observing her performance for the key sales related behavior categories was not the best procedure to take in this instance.

The author chose to use key sales related behaviors and outcomes from past studies along with some measures requested by the company president as the key sales related behaviors to look at in the present study. This was done to partially replicate past research and to use measures which the company president chose as behaviors and outcomes which were important to his company's sales region, product and company's policies. This procedure of choosing behaviors and outcomes is consistent with the manner which Troy (1983) chose his behaviors.

This study differs from Troy's (1983) study in that the subject is an outside sales representative rather than a retail sales person. It also differs from Troy's (1983) because the behavior change is focused on increasing key sales related behaviors rather than sales service behaviors. It differs from the Bacon et al. (1982) study because there was not a public display of data and because there was not any supervisor review of the data in the present study.

There was a need for the present study because many behavior change programs today include a component of self-monitoring, especially in cases where it is difficult to have an external observer present at all times, and because many of these programs
have not singled out the effects of self-monitoring alone. It is important to identify the effects of self-monitoring by itself to determine its effectiveness and to compare it with other behavior change strategies which may be more costly and less effective on a long-term basis than self-monitoring.

The purpose of the present study was to identify the effects of self-monitoring by itself prior to implementing any other behavior change programs and to develop a measurement system to aid outside sales personnel in collecting and analyzing their own performance in a systematic fashion.
CHAPTER II

METHODS

Subject and Setting

A small business owner in the blue print and graphic supply industry chose his two outside sales representatives to participate in the present study. Prior to collecting baseline data or implementing a treatment component, one of the sales representatives resigned from her position with the company and was not able to participate in the study. She resigned to open her own small business and her resignation was in no way connected to the running of the experiment. The owner chose to have the study conducted with his outside sales representatives because outside sales were down for the past year while in-house sales were up. He agreed to the study in order to find out what actually occurs with his outside sales representatives so he could assist them in trying new techniques to increase sales. The sales representative that participated in the study was employed by the company for one and one half years prior to baseline. The subject, Jane (a fictitious name), had had no previous sales training or sales experience. She had attained a degree in engineering and was previously employed as an engineer. Jane worked full time as an outside sales representative serving Kalamazoo and the surrounding communities. She was paid a salary wage, plus a monthly commission based on total dollar volume sold.
Prior to collecting baseline, the experimenter interviewed the company owner and each of the two sales representatives separately to determine what they considered the sales representatives' roles, duties, responsibilities, and standards to be. Also discussed were information systems and information breakdowns between sales representatives and the main office staff and delivery personnel to assess whether there was a need for improved communications between them.

Based on the interviews, a job model was developed which stated the major outcome variables of the sales representatives' position along with performance level standards. A checklist was designed to collect information on sales related behaviors and outcomes performed on each sales call and on sales outcome measures for each day. The sales related behaviors and outcomes checklist was designed by the experimenter through identifying what past researchers have found to be key sales related behaviors and listing them. The company owner then chose those behaviors from the list that he thought were critical to selling blue print and graphic arts supplies. He also added some outcomes that he wanted to collect data on. Both the experimenter and the company owner were also concerned with the sales representatives' work satisfaction. The experimenter designed a work satisfaction survey that Jane completed prior to baseline and in the reversal stage.

Total gross sales per month, total sales dollar volume sold by the sales representative per month, and commissions earned by the sales representative per month were measures maintained by the
company owner in graphic form. The company owner requested that the
dollar levels on the graph be changed to sales interval levels to
maintain confidentiality of his financial information. Therefore
sales outcome data are presented in equal sales intervals; for
example, 5 = $5,000.00, 10 = $10,000, 15 = $15,000, etc., or
5 = $50.00, 10 = $100.00, and 15 = $150.00, etc.

During baseline, the experimenter went along with the sales
representative on sales calls in Kalamazoo and other communities.
Observing sales interactions with both Kalamazoo customers and out-
of-town customers was done because during pre-baseline interviews
both sales representatives indicated that their performance varied
greatly depending upon these sales situations. The experimenter set
up appointments to accompany Jane on sales calls to collect
information on sales behaviors. Jane introduced the experimenter to
customers as someone doing some work for the company owner. On the
sales calls, the experimenter observed the interaction between Jane
and the customer and immediately upon the completion of the
transaction, the experimenter filled out the sales related behavior
and outcome checklist independent of Jane's information input. The
experimenter recorded the occurrence or non-occurrence of twenty-
eight targeted sales behaviors and outcomes.

Through the treatment phase of the study, Jane observed her own
sales transactions with customers and immediately following the sales
call, she recorded the occurrence or non-occurrence of the targeted
responses and outcomes while sitting in her car.
Procedure

A within-subject design with one reversal phase was employed. Baseline data were collected on twenty-eight targeted behaviors and outcomes. A treatment component was implemented which consisted of having Jane self-monitor the targeted responses using the self-recording checklist. The checklist was withdrawn during reversal phase, and reimplemented again for the final phase. The behaviors and outcomes are listed and defined in Table 1.

Table 1
Definitions of Target Behaviors and Outcomes

<table>
<thead>
<tr>
<th>Sales Behavior and Outcome Examples and/or Definitions</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Appointment (outcome)</td>
</tr>
<tr>
<td>Telephone appointment set up in advance of the sales call.</td>
</tr>
<tr>
<td>2. Lunch (outcome)</td>
</tr>
<tr>
<td>Invites customer to lunch. Holds a sales conversation over lunch.</td>
</tr>
<tr>
<td>3. Greets customer by name (Behavior)</td>
</tr>
<tr>
<td>&quot;Hi Jim&quot; or &quot;Hello Mr. Brown&quot;</td>
</tr>
<tr>
<td>4. Pleasant greeting (Behavior)</td>
</tr>
<tr>
<td>Smile, maintain eye contact, use a pleasant tone of voice and greet customer by name. Then say, &quot;How are you doing today?&quot; or some other positive statement.</td>
</tr>
<tr>
<td>5. Prepared presentation (Behavior)</td>
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<tr>
<td>Follow an outline of things that you would like to discuss, and questions you would like to ask.</td>
</tr>
</tbody>
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Table 1—Continued

Sales Behavior and Outcome Examples and/or Definitions

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| 6. | **Identifies customer's personal & product needs** *(Behavior)* | "How did you hear about our company?"
|   |                                                                 | "Have you tried other companies?"
|   |                                                                 | "Successful--Why or Why not?"
|   |                                                                 | "What kind of problems have you had?"
|   |                                                                 | "What has worked for you?"
|   |                                                                 | "How has your service been?"
| 7. | **Question customer to get his/her view of the product** *(Behavior)* | "Do you see how this product would meet your needs?"
|   |                                                                 | "Which feature do you think you will use the most?"
|   |                                                                 | "Where do you think you will be placing this new cabinet?"
| 8. | **Probes for additional information** *(Behavior)*               | "Was there some feature that you did not like in particular?"
|   |                                                                 | "How long ago did that problem occur?"
|   |                                                                 | "If that item did not work, what do you think that you would like better?"
| 9. | **Provided specific information on sales** *(Behavior)*         | "We have a special this month on our new computer chairs line."
|   |                                                                 | "The regular items that you purchase will be increased 3% next month."
| 10.| **Suggests new items** *(Behavior)*                             | "We just got a new type of graphics material that really seems to be liked by a lot of my regular customers. Would you be interested in finding out about our line?"
| 11.| **Suggest "add on" item** *(Behavior)*                          | "May I suggest that you purchase two of those new pens because you never know when someone else may want one?"
|   |                                                                 | "We also have that one in blue and green."
|   |                                                                 | "Most customers try them all and are really glad they did."
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<tr>
<th>Sales Behavior and Outcome Examples and/or Definitions</th>
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<tbody>
<tr>
<td>12. Provides information on how to use the product (Behavior)</td>
</tr>
<tr>
<td>&quot;I will demonstrate the process on how to use this new tool, First...Second..., and finally ...  Do you have any questions on how to use this product?&quot;</td>
</tr>
<tr>
<td>13. Reinforces customer's positive statements (Behavior)</td>
</tr>
<tr>
<td>&quot;That's terrific! I'm really happy that your new ideas have paid off for you!&quot;</td>
</tr>
<tr>
<td>14. Helps develop customer's self-esteem (Behavior)</td>
</tr>
<tr>
<td>&quot;You really look great today!&quot;</td>
</tr>
<tr>
<td>&quot;You really care a lot about the work you do here.&quot;</td>
</tr>
<tr>
<td>15. Compliments customer's choice (Behavior)</td>
</tr>
<tr>
<td>&quot;I think that you have made an excellent choice in buying this item!&quot;</td>
</tr>
<tr>
<td>16. Follows customer rebuff up with a friendly question (Behavior)</td>
</tr>
<tr>
<td>&quot;I can see that you really have a lot of work to accomplish today! Would you mind if I called on you at a more convenient time?&quot;</td>
</tr>
<tr>
<td>17. Sells benefits (Behavior)</td>
</tr>
<tr>
<td>&quot;This is our best model. It comes with the 90 day warranty. You do not have to pay for 30 days.&quot;</td>
</tr>
<tr>
<td>&quot;You can do almost any of your designs with this model.&quot;</td>
</tr>
<tr>
<td>18. Overcomes objections (Behavior)</td>
</tr>
<tr>
<td>&quot;Would you be interested in this product in the future?&quot;</td>
</tr>
<tr>
<td>&quot;Is cost the big factor against your decision?&quot;</td>
</tr>
<tr>
<td>&quot;We do have a similar item that is less expensive.&quot;</td>
</tr>
<tr>
<td>19. Asks for the order (Behavior)</td>
</tr>
<tr>
<td>&quot;Would you like me to order you one of those?&quot;</td>
</tr>
<tr>
<td>&quot;How many of those do you think you would like?&quot;</td>
</tr>
<tr>
<td>20. Writes order accurately (Outcome)</td>
</tr>
<tr>
<td>Records all necessary information on the order blank as stated by the customer.</td>
</tr>
</tbody>
</table>
Table 1—Continued

<table>
<thead>
<tr>
<th>Sales Behavior and Outcome Examples and/or Definitions</th>
</tr>
</thead>
<tbody>
<tr>
<td>21. 30 minutes or less (Outcome)</td>
</tr>
<tr>
<td>22. Attains a new prospect (Behavior)</td>
</tr>
<tr>
<td>23. Attains a referral (Outcome)</td>
</tr>
<tr>
<td>24. Sale (Outcome)</td>
</tr>
<tr>
<td>25. Cold call (Behavior)</td>
</tr>
<tr>
<td>26. $ amount of sale (Outcome)</td>
</tr>
<tr>
<td>27. Old customer call</td>
</tr>
<tr>
<td>28. Suggestion item sold (Outcome)</td>
</tr>
</tbody>
</table>

Two checklists were designed for the present study: a sales related behavior and outcome checklist (See Table 2) and a sales outcome checklist (See Table 3). The checklists involved the observer recording a checkmark under either the "yes" or "no" column after each behavior or outcome. The outcome checklist required Jane to total her outcome measures at the end of each day. Jane recorded on the outcome checklist during intervention phases only.
Table 2
Targeted Behavior and Outcome Checklist

<table>
<thead>
<tr>
<th>Date</th>
<th>Rep#</th>
</tr>
</thead>
<tbody>
<tr>
<td>Customer Name</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Behavior or Outcome</th>
<th>Yes</th>
<th>No</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Appointment</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2. Lunch</td>
<td></td>
<td></td>
</tr>
<tr>
<td>3. Greets customer by name</td>
<td></td>
<td></td>
</tr>
<tr>
<td>4. Pleasant greeting</td>
<td></td>
<td></td>
</tr>
<tr>
<td>5. Prepared presentation</td>
<td></td>
<td></td>
</tr>
<tr>
<td>6. Identified customer's personal &amp; product needs</td>
<td></td>
<td></td>
</tr>
<tr>
<td>7. Questions customer to get their view of product</td>
<td></td>
<td></td>
</tr>
<tr>
<td>8. Probes for additional information</td>
<td></td>
<td></td>
</tr>
<tr>
<td>9. Provides specific information on call</td>
<td></td>
<td></td>
</tr>
<tr>
<td>10. Suggests new item</td>
<td></td>
<td></td>
</tr>
<tr>
<td>11. Suggests add on items</td>
<td></td>
<td></td>
</tr>
<tr>
<td>12. Provides information on how to use product</td>
<td></td>
<td></td>
</tr>
<tr>
<td>13. Reinforces customer's positive statements</td>
<td></td>
<td></td>
</tr>
<tr>
<td>14. Helps develop customer self-esteem</td>
<td></td>
<td></td>
</tr>
<tr>
<td>15. Compliments customer's choice</td>
<td></td>
<td></td>
</tr>
<tr>
<td>16. Follow customer rebuff up with a friendly question</td>
<td></td>
<td></td>
</tr>
<tr>
<td>17. Sells benefits</td>
<td></td>
<td></td>
</tr>
<tr>
<td>18. Overcomes Objections</td>
<td></td>
<td></td>
</tr>
<tr>
<td>19. Asks for order</td>
<td></td>
<td></td>
</tr>
<tr>
<td>20. Writes order accurately</td>
<td></td>
<td></td>
</tr>
<tr>
<td>21. 30 minutes or less</td>
<td></td>
<td></td>
</tr>
<tr>
<td>22. Attains a new prospect</td>
<td></td>
<td></td>
</tr>
<tr>
<td>23. Attains a referral</td>
<td></td>
<td></td>
</tr>
<tr>
<td>24. Sale</td>
<td></td>
<td></td>
</tr>
<tr>
<td>25. Cold call</td>
<td></td>
<td></td>
</tr>
<tr>
<td>26. $ Amount of sale</td>
<td></td>
<td></td>
</tr>
<tr>
<td>27. Old customers call (warm call)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>28. Suggestion item sold</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Notes:
Table 3
Outcome Checklist

Sales Outcome Performance Sheet

<table>
<thead>
<tr>
<th>Date</th>
<th>Rep #</th>
<th>Yes</th>
<th>No</th>
</tr>
</thead>
</table>

Phone Calls

<table>
<thead>
<tr>
<th>Makes Phone Calls at 8:30</th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Has Names Prepared Before Calling</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Calls Made</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Appointment Set</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Goals Set

<table>
<thead>
<tr>
<th>Daily</th>
<th>Magazine Read (Professional)</th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Goals Attained</td>
<td>Plans Daily</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Knows How Much an Hour is Worth</td>
<td>Knows How Much Each Contact is Worth</td>
<td></td>
<td></td>
</tr>
<tr>
<td># of New Prospects Met</td>
<td>Sales Reports Done</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Customer File Updated</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Outcome Measures

| Sales Dollar Volume Sold |   |   |
| Number of Sales Calls Made |   |   |
| Number of New Customer Sales Made |   |   |
| Number of Sales from Old Dormant Customers |   |   |
| Daily Sales Report Turned in on Time |   |   |

Other Category

| Number of Suggestion Items Sold |   |   |

I was ____________________________ with my job today."

1. Dissatisfied or disgusted   
2. Barely satisfied   
3. Feeling okay   
4. Satisfied or feeling good   
5. Very satisfied or feeling great   

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The experimenter eliminated from the Sales Related Behaviors and Outcome Checklist, all items on the checklist which were not "behaviors" or any item which could not be performed on 100% of the sales calls. Eleven items were eliminated due to these procedures. The seventeen items that remained are shown in Table 4 (See Chapter III).

Baseline

Baseline data were recorded for seven sales calls on two separate days over a period of three days before intervention began. During baseline the experimenter/observer went along with Jane on her sales calls for that day. After each call, the observer filled out a sales related behavior and outcome checklist for the sales call. The observer checked whether or not Jane engaged in each of the targeted behaviors and outcomes on that call.

During baseline Jane was unaware of what the targeted behaviors and outcomes were and no feedback was given by the observer to the sales representative on those behaviors and outcomes.

Intervention

Jane was given both sales related behavior and outcome checklists and sales outcome checklists from the experimenter. She was also given a definition sheet that included the behaviors and outcomes. Jane went over the checklists and definitions and on the following day she was asked by the experimenter if she had any questions as to what was meant by the behaviors, outcomes, or
definitions. The experimenter asked her to fill out the sales related behavior and outcome checklist immediately after each sales call and to fill out the sales outcome checklist at the end of each day. She was told that the experimenter would collect the checklists at the end of each day.

Reliability Procedures

Jane tape recorded two sales calls during the intervention phase and filled out the checklists for those calls. The experimenter listened to the tape recording and filled out a checklist independent of the results of the checklists filled out by the sales representative. The company owner also went out on seven sales calls over a one-day period and completed the checklists after each sales call while the sales representative independently filled out the checklists. The percentage of agreements was calculated (between the sales representative and the experimenter, and between the company owner and the sales representative) on an item-by-item basis for each targeted behavior and outcome. Reliability was calculated by dividing the number of agreements by the number of agreements plus disagreements, then multiplying by one hundred.

Experimental Design

A single-subject reversal design was employed for the present study. Baseline data were recorded for seven sales calls over a three-day period in February, 1985. Self-recording checklists were
implemented on the fourth day. Data were collected for twenty working days for a total of 106 sales calls. Data were collected on successive work days with 2 interruptions. Jane was out for minor surgery for three consecutive days (February 8th, 9th, and 10th) and on four other days (February 15th, 21st, 26th, and the 29th) Jane worked in-house. The checklists were withdrawn on the 31st day. On the 49th day reversal data were collected on five sales calls by the company owner. The experimenter collected reversal data on three sales calls on the 53rd day. The checklists were reimplemented on the 77th day. The experimenter discontinued data collection on the 88th day.
CHAPTER III

RESULTS

Percent of targeted sales related behaviors performed are shown in Figure 1 (See Appendix A for Figure 1 Summary Data). Jane performed the seventeen targeted responses an average of 63% during baseline. During the intervention phase, checklists were implemented and Jane began self-monitoring her own sales related behaviors and her performance increased to an average of 70.4%. Prior to reversal phase, Jane's performance dropped to baseline level. When the checklists were withdrawn and Jane discontinued self-monitoring, her performance maintained at baseline levels. Her average performance was 61%. The checklists were reimplemented and Jane's performance increased to an average of 67%.

Reliability

Jane was asked to randomly tape record 5 sales calls per week during the first self-monitoring phase so that the experimenter could randomly select two of the taped sales calls. However, Jane tape recorded only two sales calls during this period because she found it difficult to ask permission of her customers to tape record their conversation unless she knew for sure that they would not be offended or object to it. The experimenter listened to the tapes and recorded on the checklist whether or not the targeted responses did occur. The experimenter then compared her checklist with Jane's checklist.
Figure 1. Percent of Targeted Sales Related Behaviors
(Figure 1—Continued)
This was to serve as a reliability measure for Jane's self-monitoring. It was also to serve as a reliability measure in testing to see whether Jane had retained the original definitions of the items on the checklist throughout the experiment. Reliability was calculated by dividing the number of agreements plus disagreements, then multiplying by one hundred. Reliability for the tape recorded sales calls between the experimenter and Jane was 93.10%.

Reliability was also obtained during self-monitoring 1 by having the company owner observe and record on a checklist the targeted sales related behaviors performed by Jane on sales calls. Jane also filled out a checklist independent of the company owner's responses. The reliability obtained between the company owner's checklist and Jane's was 96.61%. A reliability measure was obtained again during self-monitoring 2 phase. The experimenter went with Jane on sales calls and independently observed and recorded the behaviors emitted. The reliability measure was 81.58% in this final phase. The percent of checklists turned in by Jane was 100%.

Outcome Measure

"Total gross sales per month" for the company were obtained from the company owner for the years 1983 through 1985 (See Figure 2). These data, which were presented in sales intervals, were all equal intervals. These data were obtained to show any seasonal trends and to show any gross sales increases or decreases through the months of January through May during those years. The months cover the time span of the experiment in 1985.
Figure 2. "Total Gross Sales by Month" for months January through May, including the years 1983, 1984, and 1985. Total Gross Sales by Month is Represented in Sales Interval Levels Rather Than By Sales Dollar Volume Levels.
The seasonal data for the months during which the study was being conducted varied from year to year. The data for 1983 showed a down and up trend. In 1984, the data showed a complete downward trend, and in 1985, the data showed a down-up-down motion. There were no clear trends across months in previous years that would account for the data in 1985. Therefore, we cannot make any clear conclusions regarding whether seasonal trends can account for any changes in the sales data during the intervention.

"Total gross sales by month" were represented in sales interval levels as requested by the company owner. The total sales units obtained for 1983 over the five-month period indicated came to a total of 94.3 sales units. The data for 1984 were totaled to be 117.2 sales interval levels and for 1985 the sales interval levels again totaled 117.2 for that same five-month period of time. From the data obtained, we can conclude that the bottom line data did not show an increase in the 1985 data over that of 1984. This suggests that either the intervention, which resulted in increases in sales behavior, did not increase sales or that these data regarding total gross sales were insensitive to any increases in outside sales that may have resulted from the intervention.

The two sales representatives' total monthly sales and monthly commissions were obtained from the company president for 1984 and 1985. Figure 3 is a graphic display of the sales representatives' sales data and Figure 4 shows the representatives' commissions data. Sales representative #2 did not participate in the study but her
Figure 3. Total Sales Dollar Volume Sold by Sales Representative by Month for Years 1984 and 1985. Sales Dollars are Represented in Sales Interval Levels.
Figure 4. Total Commissions Earned by Sales Representatives for Months January through May, 1984 and 1985.
sales data are included since she did not officially resign until the end of the month of May, 1985.

Total monthly sales is an outcome measure that may either increase or decrease as a result of a sales behavior change by a sales representative. It is a financial measure that is of importance to the business owner, the sales representative, and the experimenter. Jane's sales outcome data was less in 1985 than in 1984 for the months of February, April, and May when the intervention was in place. We can conclude that the increase in sales behaviors did not result in an increase in sales outcome data for Jane during those months.

Monthly commissions is another outcome measure which is tied directly to monthly sales and tied indirectly to behavior changes by the sales representative. A behavior change in the desired direction by the sales representative may result in an increased commissions earned. The sales representatives did not receive commissions every month as shown in Figure 4, due to the fact that they needed to reach a minimum dollar amount of sales each month before they could earn a commission bonus. Jane's data showed that in February, April, and May of 1985 there was not an increase in commissions earned over 1984's data for those same months. We can conclude that the slight increase in the percent of behaviors performed on sales calls did not have an effect on the commissions earned by Jane. This drop may be due to the fact that in August, 1984, the sales volume level the sales representatives needed to obtain to receive commissions was
increased six commission interval levels. At this time the sales representatives received an increase in their base pay also.

Jane's sales data by customer and month were not available for the months included in the study due to a computer malfunction. Jane's total monthly sales included customers who received bi-monthly sales calls and placed orders plus those customers who did not receive sales calls, but did place an order and were customers from Jane's territory. Therefore, the outcome measures are not a direct function of the intervention. This is important to note because there is no clear relationship between the sales behaviors of the sales representatives and the sales outcome measures in this case.

Work Satisfaction Measure

There was a daily work satisfaction measure obtained during both self-monitoring phases. The sales representative checked her satisfaction level each day for the question, "My satisfaction with work is,..." on the five point scale listed below.

1. Dissatisfied or disgusted
2. Barely satisfied
3. Feeling okay
4. Satisfied and feeling good
5. Very satisfied or feeling great

An overall satisfaction measure was obtained during baseline 1 and baseline 2. It was obtained by the sales representative filling out a work satisfaction questionnaire at the end of each baseline phase in which one of the questions was identical to the daily work
satisfaction question with the same five point rating scale as above. Jane maintained an overall mean average of 3.05 throughout the study. The two scores on the question asked during baseline 1 and baseline 2 were 3 and 3.1 respectively.

These data were not directly tied to the overall outcome measures presented in this study. The work satisfaction question was a daily measure (except during baseline phases where it was only collected once during the phase) and not a measure obtained on every sales call. A work satisfaction measure was reported once during baseline, one hundred and six times during self-monitoring, once during reversal phase, and twenty-seven times during self-monitoring.

Percentage of Responses

Table 4 presents the mean percentages of 17 targeted responses emitted by Jane during each phase of the experiment. There were originally 28 items on the checklist that Jane self-monitored. All behaviors which could not be performed on 100% of the sales calls were dropped from the list along with all but one outcome measure. The items dropped included the following:

1. Appointment
2. Lunch
3. Follows customer rebuff up with a friendly question
4. Overcomes objections
5. Writes order accurately
6. Sale
7. Cold call
8. $ amount of sale
9. Old customer call (warm call)
10. Suggestion item sold

Because of their similarities, "attains a new prospect" and "attains a new referral" were combined as one item on the checklist and retained as one of the 17 behavioral measures.

Table 4
The Mean Percentage of Targeted Responses Emitted by Jane During Each Phase of the Experiment

<table>
<thead>
<tr>
<th></th>
<th>Baseline</th>
<th>Self-Monitoring</th>
<th>Baseline</th>
<th>Self-Monitoring</th>
</tr>
</thead>
<tbody>
<tr>
<td>3. Greets customer by name</td>
<td>100%</td>
<td>95%</td>
<td>100%</td>
<td>100%</td>
</tr>
<tr>
<td>4. Pleasant greeting</td>
<td>100</td>
<td>95</td>
<td>100</td>
<td>100</td>
</tr>
<tr>
<td>5. Prepared presentation</td>
<td>57</td>
<td>65</td>
<td>86</td>
<td>28</td>
</tr>
<tr>
<td>6. Identifies customers' personal product needs</td>
<td>86</td>
<td>83</td>
<td>48</td>
<td>69</td>
</tr>
<tr>
<td>7. Questions customer to get their view of the product</td>
<td>86</td>
<td>84</td>
<td>71</td>
<td>69</td>
</tr>
<tr>
<td>8. Probes for additional information</td>
<td>100</td>
<td>84</td>
<td>100</td>
<td>72</td>
</tr>
<tr>
<td>9. Provides specific information sales calls</td>
<td>57</td>
<td>92</td>
<td>86</td>
<td>72</td>
</tr>
<tr>
<td>10. Suggests a new item</td>
<td>71</td>
<td>58</td>
<td>57</td>
<td>28</td>
</tr>
</tbody>
</table>
Table 4—Continued

<table>
<thead>
<tr>
<th></th>
<th>Baseline</th>
<th>Self-Monitoring</th>
<th>Baseline</th>
<th>Self-Monitoring</th>
</tr>
</thead>
<tbody>
<tr>
<td>11. Suggests &quot;add on&quot; items</td>
<td>29</td>
<td>48</td>
<td>42</td>
<td>10</td>
</tr>
<tr>
<td>12. Provides information on how to use the product</td>
<td>57</td>
<td>65</td>
<td>43</td>
<td>35</td>
</tr>
<tr>
<td>13. Reinforces customer's positive statements</td>
<td>86</td>
<td>91</td>
<td>43</td>
<td>95</td>
</tr>
<tr>
<td>14. Helps develop customer's self-esteem</td>
<td>14</td>
<td>84</td>
<td>43</td>
<td>90</td>
</tr>
<tr>
<td>15. Compliments customer's choice</td>
<td>43</td>
<td>85</td>
<td>57</td>
<td>90</td>
</tr>
<tr>
<td>17. Sells benefits</td>
<td>71</td>
<td>72</td>
<td>57</td>
<td>55</td>
</tr>
<tr>
<td>19. Asks for order</td>
<td>14</td>
<td>22</td>
<td>43</td>
<td>76</td>
</tr>
<tr>
<td>21. 30 minute call or less</td>
<td>86</td>
<td>84</td>
<td>71</td>
<td>76</td>
</tr>
<tr>
<td>22. Attains a new prospect/referral</td>
<td>14</td>
<td>7</td>
<td>0</td>
<td>0</td>
</tr>
</tbody>
</table>

There were originally 10 sales calls recorded during baseline, 130 sales calls recorded during the self-monitoring phase, 12 during baseline 2 phase and 31 during self-monitoring 2. It was found that delivery calls and sales calls, where the person to be seen was not in or when an item was merely being delivered, were being recorded as sales calls completed and they were dropped from the data. There remained 7 sales calls during baseline, 106 during the self-
monitoring phase, 7 during the baseline 2 phase and 27 self-monitored sales calls during the re-intervention phase. Table 4 reveals that the mean percentages of targeted behaviors were higher during both self-monitoring 1 and self-monitoring 2 for the following behaviors:

13. Reinforces customer's positive statements
14. Helps develop customer's self-esteem
15. Compliments customer's choice
19. Asks for order

The mean percentages which showed an increase above baseline in the first self-monitoring phase, but did not show an increase above the second baseline were:

5. Prepared presentation
9. Provided specific information on sales calls
11. Suggests "add on" items
17. Sells benefits

Targeted behaviors which were not affected by the self-monitoring were:

3. Greets customer by name
4. Pleasant greeting
21. 30 minutes or less
22. Attains a new prospect or referral

Those behaviors that declined in mean percent when self-monitoring was employed include:

7. Questions customer to get their view of the product
8. Probes for additional information
10. Suggests a new item
CHAPTER IV

DISCUSSION

The data suggest that self-monitoring alone produced a slight overall effect in changing the performance of an outside sales representative's key sales related behavior. However, the overall increase was caused only by very large increases in only a few items which include:

13. Reinforces customer's positive statements
14. Helps develop customer's self-esteem
15. Compliments customer's choice
19. Asks for order

In fact, several of the behaviors actually decreased over the course of the study.

The overall increase obtained is consistent with the data from Troy's (1983) study as to the effectiveness of the checklist in increasing customer service behaviors with 3 retail sales personnel. The results obtained also agree with Gaetani, Johnson, and Austin (1983). In that study, self-management methods decreased the tardiness of an owner/operator of a small business (i.e. self-time logging). The present study also supports the findings of Lamal and Benfield (1982). They found that self-monitoring techniques decreased the tardiness of a draftsman in an engineering firm.

An important feature of this study was the experimental design. The within subject design in which one subject was repeatedly
observed over a long period of time revealed a large amount of information about the pattern and rate of responding of the sales representative.

There may be a number of reasons why the desired behavior change did not occur or when it did occur, why the results were not long lasting with the other targeted behaviors when self-monitoring was implemented. Among those possible reasons are the following:

1. Self-monitoring may be an effective treatment technique only when the subject has already been trained in how to perform the desired response correctly and has shown that he or she can perform it properly.

2. Self-monitoring alone may be effective as a behavior change technique but its effects may not be long lasting without implementing other techniques or contingencies.

3. The sales representative's manager or the company owner may need to reward the sales representatives' behavior in order to see some behavior change in the desired direction.

4. The degree of exertion in performing the tasks on the checklist is also an important factor as to whether self-monitoring will be effective in changing behavior in the desired direction. If something is easy to do, the sales representative may see that he or she performs that behavior on every sales call.

5. Punishment from customers for certain sales behaviors may be another factor as to why some of the targeted behaviors were not increased by the sales representative. For example, a customer may not enjoy having a sales representative following up every one of
their objections to a product when they know for certain they do not want the product. The customer may end the sales call by asking the sales representative to leave as a result of their persistent "overcoming objections" behavior.

6. Some of the targeted sales behaviors may have increased at the expense of others not being increased or possibly decreased. The sales representative may avoid some undesirable responses by spending more time performing things that are more desirable.

Self-monitoring can be analyzed using the principles of behavior to help clarify why or why not self-monitoring may be an effective treatment strategy when used alone. The checklist itself may serve as a discriminative stimulus for increasing the targeted behavior. The checklist may serve as a discriminative stimulus for the response when the sales representative looks at the checklist to recall the items on the checklist prior to performing the targeted responses. This is a form of rule governed behavior because of the delay between the stimulus and the response. The sales representative may then talk to himself or herself during the sales episode which acts as an immediate discriminative stimulus for the particular sales behaviors on the checklist. Performing one or any number of the targeted responses after looking at the checklist may serve as a positive reinforcer for looking at the checklist and performing the targeted response may serve as a discriminative stimulus for the response of recording on the checklist. Since in the present study the checklists were completed after the sales
episode, covert statements may again have mediated these effects. The recorded checklist may serve as both a positive reinforcer for the response of recording on the checklist and also serve as a discriminative stimulus for starting a new checklist. As indicated previously, there may have been any number of covert statements functioning as discriminative stimuli, reinforcement, etc., but these covert statements were not specifically dealt with in this study.

Self-monitoring does not increase the probability of obtaining the desired response on all occasions, nor for all individuals. Self-monitoring may be an effective treatment strategy to increase behavior when the individual who is to perform the items on the checklist has had a strong history of being positively reinforced for performing those tasks. Some examples of when a self-monitoring checklist may be an effective tool are in the following situations:

1. An individual in business for himself or herself may write a daily do's checklist.

2. An individual going on a trip may write a checklist of things to bring along.

3. A student may have a degree program class check-off list.

4. An individual learning a new computer program may have a check sheet.

5. A personnel director may have a critical checklist for covering topics with new employees.

One thing all of these examples have in common is that the individual's performance is followed by longer term rewards and overall benefits to the individual.
Self-monitoring may not be effective if an individual sets out to follow the checklist, but never checks off whether he or she completes the items on the checklist. A checklist may be effective on a short term basis if someone designs a checklist and requests another person to use it, but in most cases, when no long term benefits result from using the checklist, the individual will eventually stop using the checklist. In other words, checklists will only be effective if their completion leads to other rewards and these other reward systems are already set in place. Otherwise, they will have to be created and implemented to maintain the use of the checklist.

During baseline Jane had a mean percentage of 63% on the seventeen behaviors emitted on each sales call. This low level of performance may be partially a function of Jane not having previous selling experience, being in the sales field for only about a year and one half, not developing a particular selling pattern yet, and because she stated that she was not sure which behaviors on sales calls resulted in sales and which ones did not. Implementing the self-monitoring procedures increased Jane’s overall mean percentage rate of responses on the targeted behaviors to 70% over a period of 106 sales calls. Also the data revealed that there remained a large amount of variability in the percent of tasks performed on sales calls over the self-monitoring phase. There was a decrease in percent of tasks performed towards the end of the first intervention phase and shortly after the second intervention phase was
implemented. The self-monitoring checklist may have had only a short term effect because of a lack of external contingencies to maintain Jane's behavior. Jane received no specific external praise on a regular basis or monetary reward for completing the checklist or for changing her behavior. There was no way to determine if she could have increased her sales dollar volume as a result of changing her sales behavior response because those measures were not directly tied together in her case.

Sales outcome data were presented in this study to examine how self-monitoring affected overall performance. Jane self-monitored a number of sales outcomes which were not specifically dealt with in this study, but were recorded for the company owner. It was not tested as to whether these specific behaviors chosen by the company owner changed or not during the study. The overall sales outcome data were recorded to see whether there were any seasonal fluctuations in the outcome data and to identify whether the sales behaviors affected the company's bottom-line. The data showed no consistent seasonal trend during the months covering the intervention and the sales data did not increase in 1985 (when the intervention was taking place) over 1984. The results obtained concerning the sales outcome measures could not be specifically attributed to the self-monitoring treatment because the sales data were not clearly separated. Sales accredited to Jane's total sales volume included those customers Jane had completed a sales call with, plus the customers who were from her territory but she had not called on. There may be any number of reasons for why the sales data did not
increase during the intervention, but what those reasons are is unclear.

Several methodological problems need to be addressed at this time. Although baseline data were collected for only a short time during this study the variability of the data remained consistent throughout the baseline phase. It was found that in the baseline 2 phase, the data decreased to the original baseline levels. Future studies may observe baseline data over an extended period of time to remove any possibilities of missing a large increase or decrease in the data over time.

The reliability of self-monitored data for an outside sales representative is another problem which needs to be dealt with. In the present study, reliability was tested by tape recording sales calls, having the company owner observe and monitor sales calls, and having the experimenter observe and monitor some sales calls and then comparing the data obtained to that self-monitored by the sales representative. One way to improve the procedure by which reliability data are obtained in future studies would be to have the sales representative require each customer to record the behaviors emitted by the sales representatives on a checklist. The customer would then put the checklist in an envelope and return it to the sales representative prior to their leaving their place of business. The experimenter could randomly sample the customer's checklists and compare them to the sales representatives' own self-monitored data.
A unique feature of this study was that one of the observers collecting reliability data was the company owner. It would seem as though in most situations that percent of total key sales related behaviors performed on a sales call would increase during the time the company owner went along on sales calls. The data revealed that this was not the case. The company owner recorded the following sales call total percentages: (1) 47%, (2) 35%, (3) 76%, (4) 58%, and (5) 65%. The data for all but one of the sales calls were lower than any of the overall averages obtained for each treatment phase.

In this study self-monitoring did not prove to be a form of feedback in functional-operational terms as defined by Peterson and Fulton (1983). The results obtained did not show response maintenance over time. The results showed a dropping off effect at the end of both intervention phases.

This study dealt with the treatment effects of self-monitoring alone, independent of training, punishment, reinforcement, or any other treatment techniques. Self-monitoring alone with one or several of those treatment techniques are often applied as a treatment package and the effects are attained as a single measure. This study contributed to the research area of self-monitoring as a treatment technique because it looked specifically at an outside sales representative rather than someone in retail sales and because it looked at self-monitoring alone. The target behaviors in this study were a grouping of past targeted key sales related behavior categories used by other researchers in the sales field. The individual results of the key behaviors revealed which behaviors were
changed in the desired direction and which ones were not by having the sales representative self-monitor them.

The sales representative verbally stated that the checklist helped her increase her awareness of what she did on sales calls. She also stated that she felt more satisfied with her work because she knew exactly what she was doing on sales calls although it was found that her work satisfaction data showed that her job satisfaction did not increase. She also stated that she did not come out of one sales call and immediately start thinking about the next one, but that she stopped to think about which behaviors she had performed on the previous call.

In conclusion, the present study demonstrated that self-monitoring can serve as a preliminary treatment technique in changing some key sales related behaviors for an outside sales representative. Future research may look at what is the optimum number of targeted key sales related behaviors on a checklist, which targeted key sales related behaviors are enhanced by self-monitoring, and which ones are not. Future research may also determine what other treatments work best along with self-monitoring to improve key sales related behaviors. Last, future research could determine which of the treatments that increased key sales related behaviors is most cost effective and maintains its effectiveness the longest.
Appendix

Figure 1 Summary Data
Dot = Mean Percentage of 7 Successive Sales Calls
BIBLIOGRAPHY


