

# **MAKING WAVES IN THE FIELD OF CORPORATE SELLING – AN INDUSTRY PERSPECTIVE**

Action research

Co-production of knowledge

Corporate selling

As part of Middlesex University's symposium the authors of this paper draw out lessons for how a whole profession can be enabled to enquire into its own practice and co-produce new knowledge through use of action research methodology. The paper charts the journey of a CEO as he engages with academia to explore the question of 'How CEOs wish to be sold to?' and the emerging model of a new mindset for corporate selling that has emerged and how it is making an impact on the profession

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## **MAKING WAVES IN THE FIELD OF CORPORATE SELLING – AN INDUSTRY PERSPECTIVE**

In exploring modes of ‘global research practice involving co-production’ Antonacopoulou has this to say:

‘The possibilities for enriching research practice....are not merely a matter of bringing together scholars, business executives and policy makers to conduct research collaboratively. Essentially this interactive mode of engaging various stakeholder groups in the research process can not be limited to the “production” of knowledge. Instead, a learning environment is more likely to provide scope for generating ideas in the course of the research interaction that have the potential to form a critical foundation in delivering impact’  
(Antonacopoulou 2010)

This paper brings together a CEO and an academic to share a research journey that has lasted 8 years now which illustrates an interactive engaging in research which in turn has both generated ideas and, we would argue, delivered impact.. The paper is in three parts.

In the first part of the paper the academic (Dr Peter Critten) outlines McNiff and Whitehead’s framework for undertaking an action research approach and how this influenced the research journey of the CEO (Dr Philip Squire). In the second part Philip Squire describes the key stages of his research journey and the ‘co-production’ of knowledge it has created along the way. In the final part both Peter Critten and Philip Squire suggest some principles that might encourage other leaders in Industry adopt a ‘global research’ approach to practice and the role the Universities might play in ensuring the ‘co-production of knowledge’ continues and is ‘integrated’ within a wider discourse.

### **1 The role of action research in the co-production of knowledge**

‘The key question that action researchers ask is “How do I improve my practice?” (Whitehead 1989)...If you can improve what you are doing, there is a clear chance that you can influence the thinking of the other people you are working with. This would in turn influence systemic organisational transformation and improvement.’  
(McNiff 2010: 46)

McNiff credits Jack Whitehead with developing the notion in the 1970s and 1980s that ‘practitioners were capable of generating their own personal educational theories through the descriptions and explanations they offered for their practices’ (McNiff 2010: 42) She also acknowledges the role Universities (like Middlesex) now play in recognising and accrediting ‘work based professional learning’. Critten argues that the differentiation Gibbons et al make between Mode 1 and Mode 2 knowledge (Gibbons et al 1992) is now breaking down as Mode 2 Knowledge (Practice based ) becomes Mode 1 knowledge (ie recognised and accredited by academia) (Critten 2007)

In a previous paper by Critten and Squire they go further and propose the creation of ‘the university *in* the workplace’ in which academics and professional practitioners can have a shared discourse and ‘co-produce’ knowledge (Critten et al 2010). We will return to the role of the University in this process at the end of this paper. But first we outline an approach to action research which Philip Squire has used in the creation of new knowledge the evolution of which is outlined in the next part of this paper.

The co-creation of knowledge through the process of action research is not simply about its ‘production’, as Antonacopoulou points out in the extract at the beginning of this paper ( Antonacopoulou 2010). As McNiff points out , it also ‘means that practitioners have to explain how they hold themselves accountable for what they are doing (McNiff 2010 : 42). And, as she points out, this can be uncomfortable for some people. It is also, we suggest, what distinguishes the work of McNiff and Whitehead from other schools of action research.

As we will seek to show as we unravel the evolution of Philip Squire’s learning journey, it has been subjected to a range of questions along the way that continually test out what McNiff calls his ‘claim to knowledge’. How we come to know what we know is as important as the resulting knowledge itself. Getting a work based learning qualification is as much a testimony to individual students reflecting on *how* they have come to know what they know (ie their epistemology) as it is about the outcomes of their investigations.

At a doctorate level of thinking we talk about the individual being both the subject and object of their own inquiry. At this level we recognise not only the complexity of the context within which the investigation is taking place but also the internal ‘wrestling’ taking place on the inside. Philip Squire is a good example of someone who started his research collecting evidence of how CEOs preferred to be sold to but ended up having to come to terms with his own inner values and how they created a completely new ‘mindset’ for what he calls ‘Client Centred’ Leadership.

McNiff and Whitehead have over the years evolved a list of eight questions which , they argue, should underpin all action research inquiry (Whitehead 1989 and McNiff and Whitehead 2006) if the knowledge that emerges from it is to meet what McNiff and Whitehead call ‘Living theory’ (Whitehead and McNiff 2006)

1. What is my concern?
2. Why am I concerned?
3. How do I show the situation as it is and as it develops as I take action?
4. What can I do? What will I do?
5. How do I generate evidence from the data?
6. How do I check that any conclusions I come to are reasonably fair and accurate?

7. How do I show the significance of my action research?
8. How do I modify my ideas and practices in light of my evaluation?

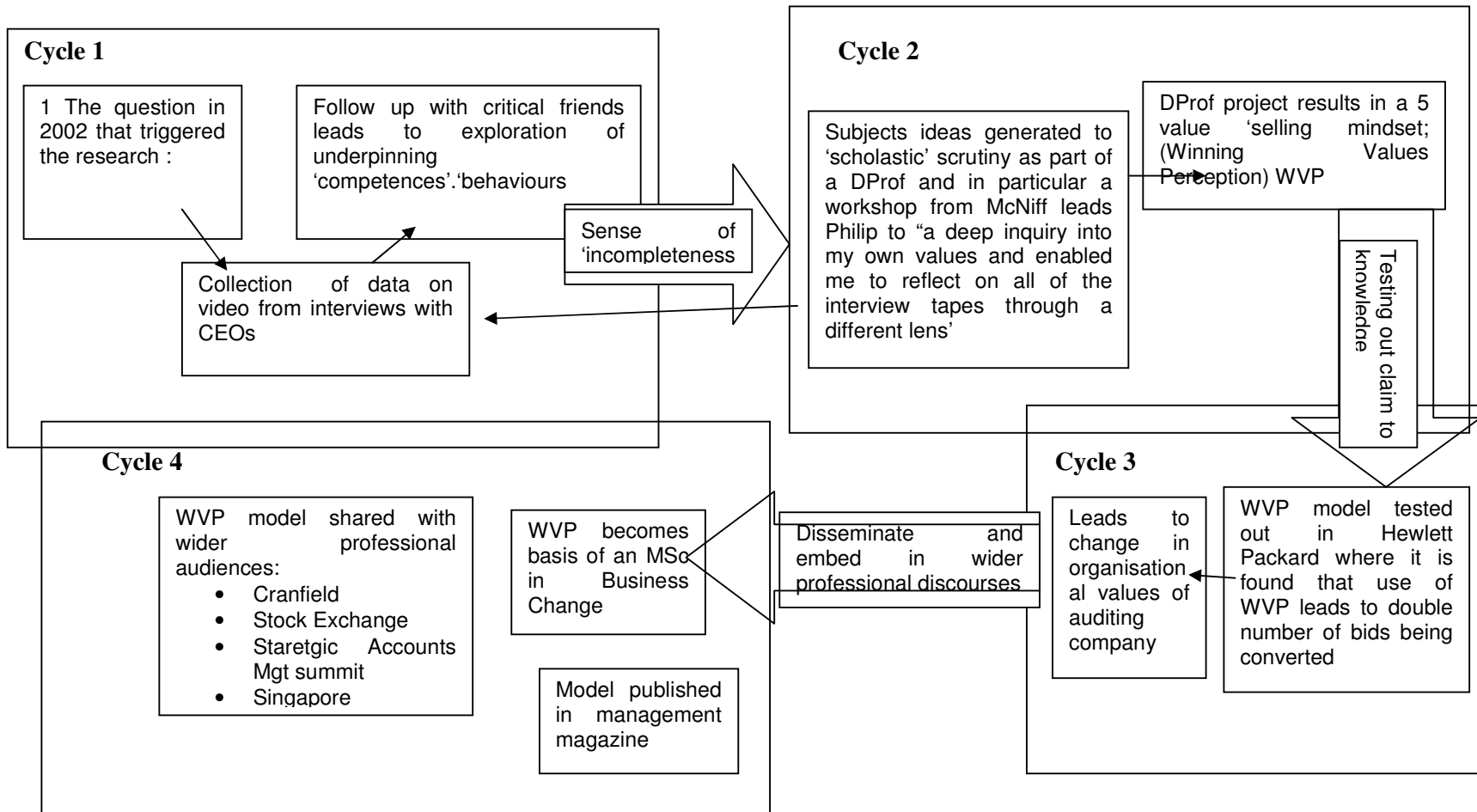
McNiff and Whitehead don't see the beginning of action research so much as a 'problem'

'so much as a situation that is somehow problematic or intriguing and that needs to be engaged with.

So one action research cycle can now turn into new action research cycles as new areas of investigation emerge. It is possible to imagine a series of cycles to show the processes of developing practice. The processes can be shown as a spiral of cycles where one issue forms the basis of another and, as one question is addressed the answer to it generates new questions.' (McNiff 2010: 70)

On the following page is a graphic representation of the various 'cycles' Philip Squire went through in following up what for him was a problematic situation, viz 'How do CEOs want to be sold to?' and how well do sales professionals meet their aspirations?'. We then use extracts from Philip's journey to illustrate how the journey of inquiry proceeded taking account of McNiff and Whitehead's questions – which we call 'Action Inquiry Questions and abbreviate as AIQs - and how knowledge has been co-produced over the last 8 years

**Figure 1**  
**Iterative Research Cycles in an 8 Year Research Journey Leading to Co-Production of Knowledge**



## **2 Iterative Research Cycles in an 8 Year Research Journey Leading to Co-Production of Knowledge**

### **Cycle 1 – The questions that triggered the initial inquiry:**

**AIQs:**

**What is my concern?  
Why am I concerned?**

*In 2002, I conducted an interview with the Chief Information Officer (CIO) of IMS Health, a large, global, pharmaceutical company. The subject of the interview was 'How do you want to be sold to?' The interview was videoed and structured around three topics – I wanted to understand the challenges a CIO faced when operating within a global company; given these challenges, what qualities they looked for in a sales person; and finally, what expectations they had of sales people. I asked him to provide me with examples of what sales people did that he liked and disliked. Clearly, he felt strongly about what he was saying, so I asked him, almost as he was leaving my office, 'What percentage of sales people met his expectations?' To which he answered, '90% of sales people are, in my view, a complete waste of time.' I decided to continue this line of questioning with the next two interviewees, the first of which was with the Chief Technology Officer of one of world's largest mobile phone operators. After his interview, he said that, in his view, only 10% of sales people 'get it'. Two out of these three initial interviewees were very critical of the performance of sales people.*

*So striking were these comments, that I started an enquiry process to find out the extent to which sales people were failing in their attempts to make the right impression and the reasons for this.*

**AIQs**

**How do I show the situation as it is and as it develops as I take action?  
What can I do? What will I do ?  
How do I generate evidence from the data?**

*By the end of 2003, I had interviewed a further 10 of our customers. Of these, eight said either that they had a low opinion of sales people, or that less than 10% of sales people met their expectations. Whilst this sample was still small, those I had interviewed were senior level executives from a range of different industries, including banks, telecoms, retail, and pharmaceutical. Between them, these executives had significant experience in dealing with sales people. The pattern of feedback was consistent with the first three interviews conducted. I had not only*

*established that most sales people were underperforming, but I had data that helped to identify what customers were looking for from sales people.*

## **AIQs**

### **How do I check that any conclusions I come to are reasonably fair and accurate? What is my concern and Why am I concerned?**

*In 2004, I invited a number of global account selling executives and global customer decision-makers to a workshop in London in order to share these findings and to take the dialogue to another level. For this, I enlisted the help of Professor George Yip, then based at the London Business School and an authority on global marketing strategies, who had also conducted some interesting research in the trends towards global account management. What started as a list of emerging competencies developed, with the help of participants at a Forum I organised with Yip, by being categorised into 'company-facing' competencies or 'customer-facing' competencies. At this point in time, I had not felt that anything was missing; our conclusions seemed to encapsulate the competencies required to be effective at selling large global and/or complex solutions. The reason, I surmised, as to why so many sales people were 'getting it wrong' was because they did not have the requisite competencies.*

*But, on reflection, something seemed not quite right with these findings but I did not know, at this stage, what it was. The evidence of my enquiry suggested that the training programmes traditionally put in place for sales people simply did not work and produced a rather dismal return. I began to question deeply the practices of my profession both in terms of sales methods and approaches, and training.*

*I had a nagging question that, somewhere, I had missed some important clues as to the reasons for poor sales performance. Sales training consulting companies, like mine, had, for years, developed programmes on leadership, listening, financial value selling, and running virtual sales teams. Companies had also invested in complex customer relationship management systems with a view to improving their sales process. Remuneration systems were there to incentivise good sales performance. Why, then, were sales people still held in such low esteem by customers?*

*In 2006, there was enough evidence to suggest that there was 'a burning platform'; that addressing the problem with a competency mindset had not worked, and nor had investments made by companies in other sales performance enablers, such as CRM.*

## Cycle 2 - Subjecting my inquiry to 'academic' scrutiny

### AIQs

**What is my concern?**

**Why am I concerned?**

*In the meantime I had been accepted as a student on the Doctorate in Professional Studies at Middlesex University to continue my research journey but now under academic supervision. I attended a presentation by Jean McNiff in August 2006. She started the presentation by saying that 'to get a clear idea of what action research is, is to be clear about your "values".' This prompted a deep enquiry into my own values, and enabled me to reflect on all the interview transcripts through a different lens. Rather than looking at customer interviews with a competency-based mindset, I should explore the interview transcripts with a values-based mindset. My logic was as follows: customers are critical of many of the behaviours they see in sales people, and they also describe how they want sales people to sell to them. Behaviours of sales people are influenced by competencies as well as values. Having the right values would influence the right behaviours. For example, a sales person who truly held a value that was customer-focused would be naturally inclined to listen carefully to what a customer was saying, would not manipulate the conversation, and would ask the right questions. Furthermore, I sensed that, if the values were engrained, i.e. lived, competencies would evolve naturally. Could it be that companies had never seriously considered the role of values in the sales process? Could the disconnect be a values misalignment rather than a competency misalignment? To what extent were companies seeking to align their values framework with those of their customers?*

*Thus, began an enquiry to establish the importance of values in the sales process. Dependent on the results, could a new framework emerge that would enable practitioners to develop closer, deeper, and more profitable relationships with their key customers?*

### AIQs

**How do I show the situation as it is and as it develops as I take action?**

**What can I do? What will I do?**

**How do I generate evidence from the data?**



*As I began my journey in considering the values that customers sought of sales people, I reflected on my own values. I found it difficult to articulate my values, as I had never before been asked to articulate what these were, and what evidence I might have to support them. The journey I have described so far has helped provide supporting evidence of lived values. Nowhere was this more tested than my reflections after myself and family were caught up in – and survived the Tsunami of 2004. Reflecting on pivotal moments such as the Tsunami and others helped to identify what is genuine and authentic about one's values. I concluded that the following are my lived values. **Persistence: Collaboration: Completeness: Space: Creativity: Authenticity: Loyalty: Courage:***

*I learnt that knowing one's lived values is a predictor of behaviour. The fact that I know how I will act in a life-threatening situation, is curiously reassuring. Predictable behaviour helps to build inner confidence and trust with others.*

*Examining in some detail my personal values enabled me to review the empirical data with a values perspective with confidence. Over a period of a year and in consultation with others in my company and clients we created a framework that identified positive and limiting values. The positive values that clients look for from sales people are **Authenticity, Client Centricity, Proactive Creativity and Tactful Audacity.** Whilst I recognised my personal values I felt were much aligned and not in conflict- the degree to which I lived my personal values would influence the extent of my personal success in the world of sales and that of my company and its employees. So how could I apply this framework in real life?*

#### **AIQs**

**How do I check that any conclusions I come to are reasonably fair and accurate?**

**How do I show the significance of my action research?**

**How do I modify my ideas and practices in light of my evaluation?**

***How can the Model that had been emerging from my DPROF be best disseminated amongst clients?***

*From 2006 I began working with Hewlett Packard's large deal pursuit team. This team focussed on deals that were worth over \$50 million. The team members were highly experienced Client Business Managers, Project Directors, Solution Architects, Financial Analysts. Their problem was that they failed to meet the performance standards set by the management team on close ratios, cost of sales and value of deals done. I worked with the European Project Team Director to create a programme that encouraged the values to be lived during key stages of the sales cycle which we called the 'Winning Value Proposition (WVP)' Programme*

*We were able to compare the results of the Winning Value Programme at Hewlett Packard. This table below shows the performance of the deal teams using the WVP approach with those that did not.*

	Winning Value Proposition (WVP)	Non WVP
Total deals	11	12
Won	8	4
Percentage conversion	73%	33%
Value (million)	\$4,805	\$394

*The HP story was subsequently published in the Strategic Account Management Association magazine Velocity in 2009. The results from HP demonstrated that the values were indeed a transformative construct for the large deal pursuit teams. The Publication was an important first step in reaching out to a wider audience. The publication provided legitimacy in that others in my profession began to take note of my findings. Some of my research insights have now been quoted by my competitors and I even found that a large tract of my values framework has been used (unacknowledged) by a journalist in a blog on the internet.*

*At a personal level I realised that there was another important parallel learning in place. One had to do with the action learning living theory approach. The doctorate had enabled me to think differently and reflect on what I heard and saw in a different way. I had seen the power of such reflection in creating a new paradigm on how to improve sales productivity. Values based approach to selling is a very new concept. If like-minded sales organisations also saw the benefit of reflective practice they too could benefit from further insights into their business as I have done. Thus I saw Work Based Learning model as being a vehicle for change in the selling profession and another vehicle to promote change with a story that I was becoming increasingly confident in sharing.*

### **Cycle 3 - Testing out the model in variety of contexts**

#### **AIQs**

**How do I check that any conclusions I come to are reasonably fair and accurate?**

**How do I show the significance of my action research?**

**How do I modify my ideas and practices in light of my evaluation?**

***How have organisations taken on board the model and adapted it to their own business***

*I recall sitting with a senior executive of Hewlett Packard who was talking about the recent scandal in the board room where Patricia Dunn its chairman had been found to have bugged the phone lines of some of her fellow board room colleagues. We spoke about values and I began to explain how I can reconnected with my personal values as part of the process of doing the doctorate and that this had been very helpful in preparing me for the thesis. I found my self explaining the concept of work based learning and this resulted in our helping HP to set up their first Work Based Learning programme for their large deal pursuit team. They selected a group of six people to do a Masters – MSc Business Change – Two completed the programme both with distinctions. Their thesis topics were on Due Diligence (Authenticity) and Innovation (Proactive Creativity). Both of these thesis produced interesting new insights which have subsequently been embedded into HPs large deal pursuit process.*

*In 2007 we won a very large contract with Santander Plc to design and develop their retail branch staff as part of a sales transformation strategy. They were interested in accreditation and we partnered with the Institute of Work based Learning to set up a work based learning accreditation programme for their 49 Regional Managers and 1200 Branch Staff. In 2008 we developed a project to help HBOS develop a work based learning programme for 14 of their branch sales coaches. Since 2009 we have also been working with Standard Chartered Bank to create a work based learning framework for their training and development curriculum for over a 1000 of their Relationship Managers and Branch Managers. The results of these projects will be very interesting to review when the different cohorts complete their work based learning projects. To what extent has reflective practice moved individuals and organisations to develop more effective sales practices? Thus I can see momentum being created in a new market segment that will help increase the professionalism of sales practices across different sectors and also create economic value to corporations and individuals taking part.*

*In addition to the banking sector we also embarked on a remarkable project with a firm of auditors who were close to losing their largest European Client. We were asked to conduct a series of 14 interviews with their customer a major retailer examining what lived values the retailer saw from the auditing team servicing their account. As a consequence of the process the companies EMEA business decided to create a new organisational values construct based largely on the values model we had defined for sales effectiveness. They argued that this made total sense ‘as we are service company to base their organisational values on those desired by their customers’. As our relationships have been forged at the highest level of the company and they have been able to set ‘policy’ on the values they want their staff to live. This contrasts with the banking initiatives where the transformation journey is more a bottom up approach.*

## **Cycle 4 – Disseminating and embedding the knowledge within the corporate selling profession**

### **AIQs**

**How do I check that any conclusions I come to are reasonably fair and accurate?**

**How do I show the significance of my action research?**

**How do I modify my ideas and practices in light of my evaluation?**

*A number of significant events have taken place that have helped disseminate the models (i.e. a values based model and also a reflective practice model ) to new audiences.*

*Cranfield University: On the 24<sup>th</sup> September 2009 Mike Hurley from Hewlett Packard and I presented the Hewlett Packard values based approach to Cranfield University's Key Account Management Club where 70 senior sales people attended.*

*London Stock Exchange(LSE): On 24<sup>th</sup> April 2010 we hosted an event Titled Sales Transformation: Changing Mindsets where we brought together academics, businesses and sales practitioners to explore different sales practices across different industries. I shared the values based research at this event and Middlesex also talked about reflective practice and work based learning.*

*We have also submitted work with clients to the National Training Award council. In 2009 we won an award for the work we did with Hewlett Packard and in 2010 we won an award or the work we did with the auditing company. Both awards recognised the role the values based framework had in making both companies more sales effective. These awards again provide added legitimacy to the journey we have embarked upon as well as access to a larger community.*

*Oslo: On the 27<sup>th</sup> September 2010 I was invited to present my research findings to 50 senior level sales executives at a Forum hosted by a sales training company. This opportunity came about as a result of someone from Norway attending the LSE event in London.*

*Paris: On 14<sup>th</sup> March 2011 I am presenting at the research findings with Michael Hurley at the Strategic Account Managements European Summit.*

*Singapore : On the 24<sup>th</sup> March 2011 Consalia is running a similar event to that we ran at the London Stock Exchange . Academics, business people and sales executives will attend a forum to discuss best practices in sales. The Values Model and Work Based learning model will be among the topics covered.*

*Thus by now it is clear that the message is being shared to audiences in different geographic locations. But how is it being further developed, changed and evaluated?*

In the last part of this paper we seek to find a way to respond to the last question posed by Philip Squire and how the iterative cycles of action research which has led, we would argue, to the co-production of knowledge, can continue supported by both the business world and academia

### **3 The Role of the University in Facilitating the Co-Production of Knowledge**

Antonacopulu has laid down a 'challenge for Management and Organisational Learning Scholars' which is 'to demonstrate that in studying learning and knowledge processes they are committed to unlearning by asking new questions that embrace the unknown. This may be a critical step to enhance the impact of their scholarship by demonstrating that they apply what they preach to their practice first' (Antonacopulu 2009:428). Philip Squire's journey has demonstrated the impact academia has had in helping him come to terms with questioning 'my deeply held assumptions about what is required to be effective in sales, and in doing so, I have challenged current frameworks used by fellow sales training practitioners as to the quality of what we are teaching in the classroom and challenged what sales professionals consider as better practice' (Squire 2009:152)

Squire has argued that the key role for academia in helping co-produce knowledge with business is the contribution they can make to what he calls 'robust research' and Antonacopulu refers to as 'scholarship' (Critten, Leppenwell and Squire 2010). Critten has argued that academia can take up a middle ground and provide a forum within which Mode 2 can be translated into Mode 1 knowledge as Philip Squire has demonstrated (Critten 2007

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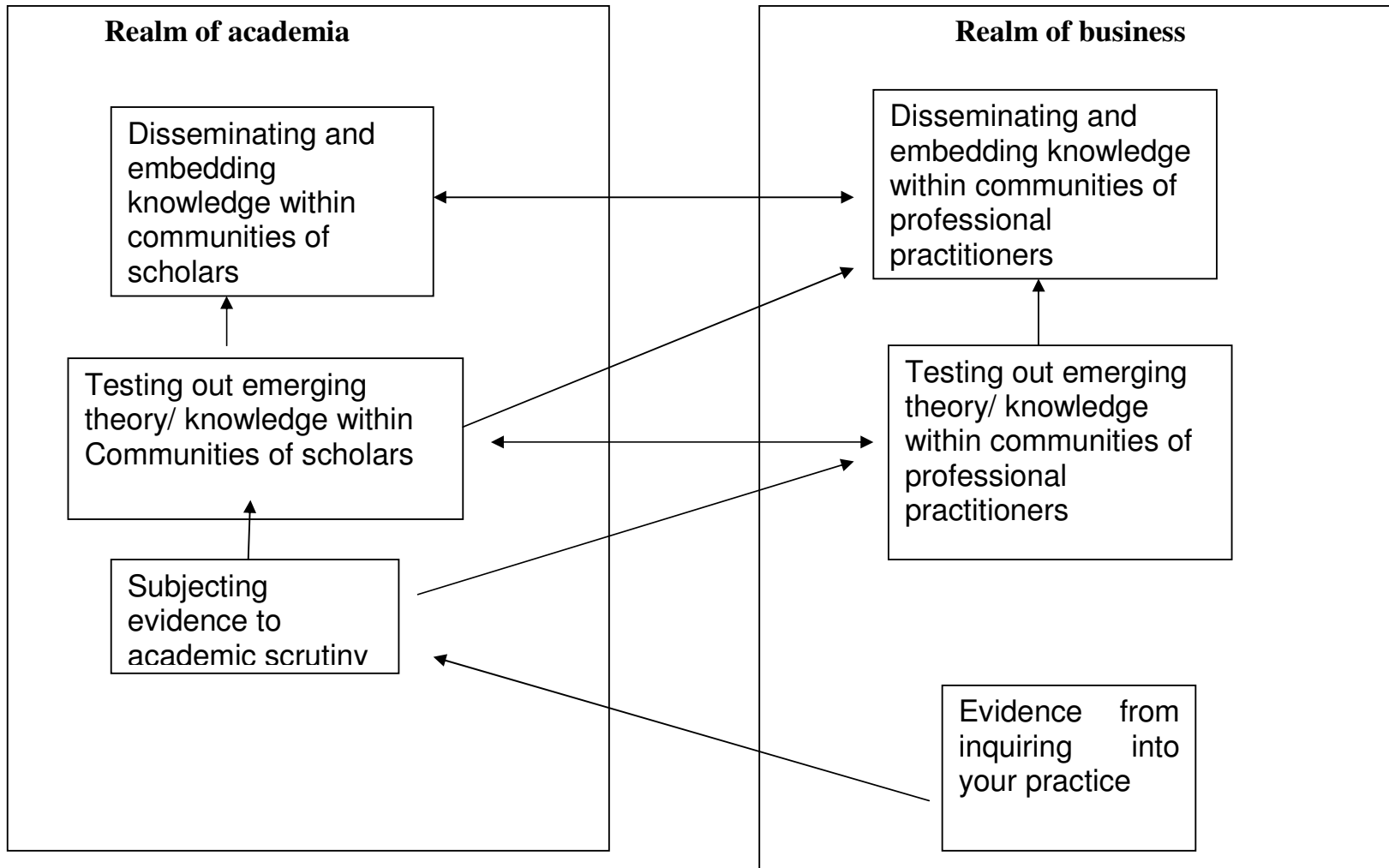
On the next page we illustrate how knowledge can be co-produced between the realms of academia and business

It all starts with a question the response to which leads the professional practitioner to collect evidence, as with the case with Philip Squire. When he started videoing interviews with CEOs across the world about how they wished to be sold to, he didn't necessarily see himself 'doing research' but was sufficiently curious to make sense of the evidence he was collecting in an academia environment. Doing a doctorate introduced him to action research which, as he says, 'prompted a deep enquiry into my own values, and enabled me to reflect on all the interview transcripts through a different lens.' As a result he creates a new model for effective selling based on values rather than competences which he then proceeds to 'test out' in the public domain embracing both the academic and the business world.

And finally he disseminates his new theory of selling to a wider audience, again embracing both the academic and business worlds.



**Figure 2: Co-production of knowledge across the academic and business domains**



## CONCLUSIONS

In this paper we have sought to demonstrate how a partnership between academia and business can lead to the co-production of knowledge that can be seen to make a difference not only to that business but to the whole profession within which it is situated. We have also sought to show how a research methodology, action research, can provide a language to make sense of and validate knowledge in the process of its very creation.

The penultimate action inquiry question in McNiff and Whitehead's approach to carrying out an action research asks: 'How do I explain the significance of my action research inquiry?' McNiff writes that this is important because 'You demonstrate that you are capable of generating theory, that is, that you are able to explain why you are practising in a particular way and what you hope to achieve' and ' You are ..developing new discourses and debates about how your profession may move forward and what pathways it may take'. (McNiff 2010: 111)

We hope that the story we have jointly told will encourage other businesses to inquire into their practice in the same way and generate knowledge to make similar waves within their respective professions

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