Agile Sales: An Exploration of Agile Methodologies in Sales

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Abstract

In today's highly dynamic environment, companies not only need new products and services but also an innovative functional sales process. Companies that have an agile environment can create more innovative products and services. Over the past 25 to 30 years, agile methodologies have drastically altered the process of software development. Recently, they have started to spread across a broad range of industries and functions. Yet, scant research has investigated the use of agile methodologies in the sales industry. Hence, this paper contributes to the research on agile methodologies by extending the context into sales and by providing important managerial implications. The findings are based on in-depth interviews with sales representatives and agile experts across four countries. Benefits and impediments of agile methodologies in sales are outlined and success factors are described.

Keywords: Agile Sales, Sales Process, Agile Methodologies, Scrum

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Introduction

Technology advancements and new customer requirements are changing the world of sales. To-day, consumers can search and comparison shop online, while B2B customers continue to increase their requirements, expectations, and optimize their procurement process (Gervet, Jonk, Handschuh, & Tandrup, 2015). In response to this highly dynamic environment, companies that can create an agile internal environment can accelerate profitable growth. An agile environment is characterized by the adoption of an agile methodology within a rapidly changing and unpredictable environment. Agile methodologies involve common values, principles, and practices (Rigby, Sutherland, & Takeuchi, 2016). An agile adoption allows organizations to increase the quality and speed of new products into the market as well as boost the motivation and productivity of their teams. By continuously adapting to customers' changing priorities, agile methodologies improve customer engagement and satisfaction (Rigby et al., 2016).

In the past, agile methodologies have mainly been used in software development, yet they have started to spread across a broad range of industries and functions such as business intelligence, the financial sector, and strategic management, among others (Rigby et al., 2016; Weinrich, Volland, & Muntermann 2016; Larson 2011; McFarland 2008). Nevertheless, little attention has been given to the applicability of agile methodologies in sales.

Within the sales literature, several books and studies have been written about agility selling, which refers to having an agile mindset as a salesperson (Chonko & Jones, 2005; Gias, 2016; Konrath, 2014; Scott, 2016). However, little attention has been given to the usability of agile methodologies in sales beyond the importance of an agile mindset. While several online blogs write about the implementation of agile methodologies in sales (Hogan, 2016; Kriselt, 2013;

Roach, 2015), only two published papers were found. The first paper, a case study, provides insights on how Scrum improved the predictability of the company's sales process, which led to an increase in revenue (van Solingen et al., 2011). The second paper provides similar insights into a telecom sales team in Turkey, which summarizes the team's agile transition using Scrum (Akdag, 2014). While these two papers outline a successful implementation of an agile methodology in sales, they were limited to case studies. Hence, this study aims to alleviate the knowledge gap in the use of agile methodologies in sales.

The objective of this paper is to examine the use of agile methodologies in B2B sales through the conduction of in-depth interviews with sales representatives and agile experts. Four research questions (RQ) can be derived from this objective:

RQ1: Which agile methodologies are currently used in sales?

RQ2: What are advantages in implementing agile methodologies in sales?

RQ3: What could prevent sales organizations from implementing agile methodologies?

RQ4: What are critical factors in implementing agile methodologies in sales?

In order to determine the appropriate interview questions, an extensive review of literature regarding agile methodologies and agile sales was conducted. A discussion of literature addressing relevant research on agile sales and agility selling will be provided. Second, the research process and methodology will be explained. Third, the findings of the interviews are described and discussed. Managerial implications are then provided.

Theoretical Background on Agile Literature Review

In 2011, seventeen experienced software engineering professionals, known as the Agile Alliance, met and created the Agile Manifesto, a manifesto for agile software development with its

values and principles (Beck et al., 2001). The Agile Alliance recognizes the importance of process but places more emphasis on the interactions of skilled individuals to deliver a high quality product (Flower & Highsmith, 2001). Through a focus on close interactions, the team can better understand and deliver what the customer wants. Moreover, the team immediately knows when the customer has changed his or her mind, whereas by just following a plan, the team would have missed the opportunity to adapt their product or service accordingly. Overall, the Agile Alliance agreed to a common adjective for their methods: agile (Flower & Highsmith, 2001). The term agile was already used for decades in the manufacturing industry and referred to its flexible practices (Williams & Cockburn, 2003). However, the Agile Manifesto represents the basis of agile methodologies (Beeridge, Gray, & Measey, 2015).

Agile Approach

According to Rigby et al. (2016), there are several conditions which are favorable for an agile approach. Typical agile market environments are characterized by a high degree of complexity, constantly changing customer preferences, unknown solutions, and requirements, which evolve throughout the development process. The customer involvement is feasible as customers can collaborate closely with the vendor to meet customers' needs and expectations. Throughout the development process, incremental deliverables are valuable to the customer as expectations and requirements can change over time.

According to Le Meunier-FitzHugh and Douglas (2016), salespeople in the B2B context work today in a complex environment, where expectations and preferences of B2B customers are constantly changing. This sophistication of the buyer is adding to the complexity of current market conditions for sellers (Le Meunier-FitzHugh & Douglas, 2016). Hence, Chonko et al. (2003, p. 935) state the importance of promoting learning through structured and

institutionalized practices by stating the following: "in the absences of learning, sales organizations and sales personnel are destined to repeat past practices and behavior – irrespective of their effectiveness." The sales team likely needs support in developing routines and practices around their sales process, interactions, and learnings to respond to increasing competition, more demanding customers, and the complex selling environment (Johnston & Peters, 2011). Due to these similar conditions of software development and sales, this paper aims to explore if agile practices and frameworks could provide sales organizations with routines and practices to overcome some of the challenges described above.

Scrum

According to VersionOne (2016), Scrum is the most commonly used agile methodology in software development. The two papers about agile methodologies in sales previously mentioned focus on Scrum. It is "a framework within which people can address complex adaptive problems, while productively and creatively delivering products of the highest possible value" (Schwaber & Sutherland, 2011, p. 3). The approach was initially used within manufacturing (Takeuchi & Nonaka, 1986). Scrum focuses on an iterative, incremental process to continuously inspect and adapt (Sutherland & Schwaber, 2007). Moreover, it is a framework for team performance and can be applied to any project to deliver improved results within the evolving business environment (Iver, 2009).

The process starts with the sprint planning, where all Scrum members determine and plan the work which has to be accomplished within the next sprint. Daily meetings discuss the team's status with the following questions: What did I work on yesterday? What will I work on today? Do I have any impediments? All three questions refer to each team member's contribution to the sprint goal and allow the team to inspect their progress towards the pre-determined sprint

goal. After each daily Scrum, further discussion and support for team members and their obstacles occurs (Schwaber & Sutherland, 2016). At the end of the sprint, a review is performed to demonstrate the incremental deliverable. The Scrum team receives customer feedback in order to evaluate their deliverable and plan for their next sprint. The inspection of the product or service to adapt to the customer's value is highly emphasized and expected to be repeated continuously. Prior to the next sprint planning, the entire Scrum team holds a sprint retrospective to evaluate their collaboration and work achieved. This provides them with the formal opportunity to create a plan of improvements and to integrate them in the next phase. The retrospective not only reviews the processes and tools used, but also the interactions and relationships between the team members. The focus is on continuous improvement and goal achievement (Schwaber & Sutherland, 2016).

Agile Methodologies in Sales

In an interview in 2011, Jeff Sutherland, one of the authors and co-signer of the Agile Manifesto and CEO of Scrum Inc., argues that the agile methodology Scrum works in sales (Heuser, 2011). He shares his experience in a paper about a successful implementation of Scrum in a large software organization in the Netherlands. This company's previous perception was that their sales process was unpredictable and controlled by their customers. The sales team was intrinsically motivated to better understand the Scrum methodology as they were selling agile software development and Scrum consultancy to their customers. Through the implementation of Scrum practices and values, salespeople were engaged in ongoing improvement, and the sales process became more transparent. Furthermore, the paper states that the study provides the "first documented insight into how Scrum can improve predictability in the sales process leading directly to increased revenue" (van Solingen et al., 2011, p. 284). Since the adoption of Scrum in the

sales department, the company's revenue doubled and sales teams were able to fully understand and control their sales process, as well as better predict customer steps throughout their sale cycle (van Solingen et al., 2011).

Another paper by Akdag (2014) discusses agile processes in a telecom sales team, which was able to improve their sales revenue by 65%, mainly driven by the reduction of complexity and an increase of collaboration. In addition to these two articles, there are several industry blogs about the use of agile methodologies in sales. Most of them are referring to the Scrum method-ologies as suitable for sales organizations to become more productive. Variations of the Scrum methodology such as working in sprints, forming a sprint backlog, and holding daily stand-ups are described (Kriselt, 2013; Newman, 2016; Roach, 2015). While both case studies and trade blogs provide a few examples of the implementation of Scrum in sales, no comprehensive re-search has been conducted on the use of agile methodologies as well as the benefits and imped-iments salespeople are facing when implementing these.

Agility Selling

The importance of a general agile mindset of employees to create an agile organization has been extensively discussed in the literature (Ambler, 2003; Breu, Hemingway, Strathern, & Bridger, 2002; Chonko & Jones, 2005; Muduli, 2013). As such, several articles and books have been written about agile sales, agility selling, and salesforce agility (Chonko & Jones, 2005; Gias, 2016; Konrath, 2014; Scott, 2016). While agile methodologies are processes and frameworks (Levy, Short, & Measey 2015), agility selling refers to the thinking and mindset salespeople need in order to be agile within a sales organization (Chonko & Jones, 2005). Chonko and Jones (2005) initially defined the characteristics of sales force agility by applying concepts of agility from the manufacturing literature. An agile salesperson delivers value to the customer by

decreasing cycle time for their customers and anticipating change. The cycle time can be reduced by the salesperson's alertness to changing customer behavior and their ability to close prospects quickly. When confronted with change, an agile salesperson has the ability to leverage resources and capabilities within the organization. They acquire and transfer their knowledge needed to solve the customer's problems and are able to leverage it with their team members' knowledge to generate team solutions. By focusing on a close customer collaboration, the salesperson can anticipate and respond rapidly to current and prospective customer needs (Chonko & Jones, 2005).

Konrath (2014) describes an agile mindset as what keeps the sales force going through difficult times and assists in overcoming challenges. Agile sellers tackle problems differently. Instead of fearing potential difficulties, they transform their problems into challenges. Salespeople who see mistakes as an opportunity for growth and as a valuable learning experience, experiment and utilize their full potential to set themselves apart from their peers (Konrath, 2014). As outlined above, the mindset of agility selling can be acquired by each individual salesperson, however, management actions can also promote workforce agility through training, compensation, empowerment, teamwork, and information systems. (Muduli, 2013).

While this mindset of agility has been explored in prior sales research, there is a clear lack in the research of agile methodologies in sales. However, the case studies on Scrum suggest the benefits of agility could be heightened through actually applying agile methodology. This is explored in the following study.

Methodology

The lack of existing empirical work led to the decision to follow an exploratory approach of qualitative interviews for this research. The data collection process consisted of 12 semi-structured interviews with nine sales representatives and three agile experts across the United States, Germany, the Netherlands, and Romania. No new insights emerged after 6 interviews. Thus, since saturation was reached, 12 interviews were determined sufficient to understand how the sales industry views agile methodologies (Glaser, 1998). The smaller sample size is also justified in that the primary purpose of this research is to explore how agile methodologies may be implemented in sales, not to make generalizations about the subject matter. However, as utilized and noted by previous research, the methods used here allows us to understand agile methodology beyond the cases used here (Miles & Huberman 1994; Winklhofer & Diamantopoulos 1996; Karlíček et al. 2014).

Selection criteria included that sales participants were working within the B2B software industry, where agile methodologies are often used. With that approach, the researcher aimed to increase the likelihood of participants being familiar with agile methodologies or having already used them within sales. The interviews were conducted via phone, lasted approximately one hour, and were recorded in order to create transcripts. Participation was voluntary and respondents were not given any incentives for the interviews. Pseudonyms were used to protect the participant's identity. Ten companies in four countries were represented, with sales experience ranging from less than a year to 26 years, with an average of 15 years of sales experience.

The interview guide was developed based on grounded theory principles, such that the guide centers on the study on the phenomena of interest yet is flexible to allow for theory to emerge.

The semi-structured interview guide was developed following an extensive literature review of agile methodologies and agile sales. Guided by the agile values, two interview guides were developed for the two respondent types, sales representatives and agile experts. While both guides contained many of the same questions, some adjustments had to be made based on the respondent type and person. Open-ended, descriptive questions were used to provide structure to the interview yet leave room for related follow-up questions to emerge (Glaser 1998; Taylor & Bogdan 1998). See Appendix for the interview guide.

The data was analyzed using the grounded theory (Glaser & Strauss 1967), in which categories are identified through the iterative examination of the data throughout the research process. Analysis of the interviews began immediately after the first interview in line with grounded theory approach (Glaser 1998). After transcriptions, data was coded through open, axial, and selective stages (Corbin & Strauss 1990). All transcripts were analyzed by two researchers separately, and any discrepancies were discussed and a consensus reached. Open coding occurs first and seeks to break down data into discrete parts. Clusters are created based on data that appears to be related to similar phenomena. The second stage of coding, axial, seeks to make connections between categories. The last stage, selective coding, is used to select primary categories, relate them to the other categories, and validate the connections. Throughout analysis, the researchers attempted to identify any quotes that did not fit into the emerging framework to ensure that data was not being forced into a category or framework. Final emerging themes will be outlined below.

Findings

Out of the nine interviews with sales representatives, one company was practicing a mix of Scrum and Kanban with their sales team, two respondents had a good understanding of agile methodologies, and the other six had either an elementary or no understanding of it. If participants had only an elementary or no understanding of agile methodologies, the researcher explained the basic principles, values, and practices of Scrum. We chose to focus on Scrum as it is the most widely recognized of the agile methodologies. When asked to define agile in sales, all respondents were able to do so. Most definitions related to the salesperson's ability to quickly adapt, respond, and adjust to changing customer requirements. Overall, all sales participants had some common sales process in place, however, two explicitly mentioned that they do not have to adhere precisely to it. More details about the general sales practices of the seven interviewed sales organizations and how many times the theme emerged in the data (frequency) are outlined in Table 1.

Sales practice	Description	Frequency (max. 9)
Compensation	Salespeople are compensated on an individual basis.	9
Internal collaboration	Close cross-functional collaboration with a technical salesperson, who is more familiar with the technical information of the company's software product.	6
Sharing of knowledge	Sales respondents collaborated by either sharing experiences or best practices with each other, while four of them hold weekly team calls.	8
Internal orchestration	Salespeople mentioned their responsibility to orchestrate necessary resources for the customer within the company.	5
Customer collaboration	Sales representatives described their customer relationships as very trustworthy, close, and collaborative.	6
Team-based selling	Respondents mentioned that some teams within their organization engaged in team-based selling.	4
Planning tool to collaborate	A discussion document with the customer, which is created at the beginning of the sales cycle and includes all necessary steps of the entire sales cycle.	3

Table 1: Overview of agility-related sales practices in participating sales organizations

The categories which emerged in the coding process are benefits, impediments, and success factors. Overall, the two groups were similar in responses. In the following section, all three categories will be discussed and illustrated with tables and respondents' quotes.

As will be described below, these findings line up well with research in self-determination theory (SDT). Self-determination theory assumes that "all individuals have natural, innate and constructive tendencies to develop an ever more elaborated and unified sense of self" (Deci & Ryan 2004, p. 5). Researchers often use SDT as a theoretical framework to understand motivation; hence, it is understandable that the findings outlined below fit within this theoretical framework. The three components of SDT (autonomy, competence, and relatedness) will be discussed below in relation to the emerging themes. When these components are positive, SDT posits that individuals will experience increased motivation; when negative or lacking, individuals will experience decreased motivation. This motivation can be translated here into the likelihood to adopt agile methodologies.

Benefits

The first category of benefits was identified as a dominant discussion point throughout the interviews. While agile experts elaborated on the benefits agile methodologies could bring to a sales team, sales representatives were also able to identify agile values they are already implementing or could imagine implementing in their sales team. Within the category, seven themes related to benefits emerged in the data. Table 2 provides an overview of the themes identified within this first category as well as provides a short definition of each theme and how many times the theme emerged in the data. All seven of these themes fit well with SDT's need for competence, which reflects the desire to feel effective in one's environment (Deci & Ryan

2002). Two themes, team cohesiveness and collaboration, also fill the need of relatedness, which reflects the desire to feel connected or close to others (Deci & Ryan 2000).

Theme	Definition	Frequency (max. 12)
Continuous improvement	Inspecting, adapting, and receiving feedback gives the opportunity to have sales problems come up faster and to continuously improve.	10
Common process	Framework guides process, creates common language, and can standardize what works best.	8
Team cohesiveness	Team encourages and supports each other with knowledge, sharing best practices, and different perspectives.	8
Customer collaboration	Close customer collaboration and continuous feedback enable team to stay current and align with demand.	7
Tracking progress	Support in tracking and checking on sales results and how team progresses throughout the sales cycle.	7
Urgency	Daily communication meetings can be beneficial during intensive times and when the sales cycle is short.	4
Accountability	Sales managers and team can verify what is currently being worked on and what everyone is going to do.	3

Table 2: Definition and frequency of identified benefit themes

Continuous Improvement

The iterative process in agile methodologies of constantly inspecting and adapting refers to the theme of "continuous improvement." This theme represents a benefit to salespeople as they must stay current with constantly changing customer requirements. Feedback from the customer can support in continuously improving oneself, while personal reflection and comparison to other team members can be motivational to become more efficient, as mentioned by one respondent:

> *"If you have a daily reminder of what someone else is doing successfully, it pushes you to do more. If you are on an island by yourself, you can just call it at the end of the day." – James, Account Executive*

143

Moreover, working in sprints and achieving frequent improvements were described as enjoyable

by the following respondent:

> *"And most people like it, they want to be involved, they want to see what they are doing, what kind of effect it has. And if they found something wrong and they fix it in the next sprint, the set of achievements are much prettier and earlier achieved." – George, Partner*

Within this theme, participants also mentioned the benefit that problems come up faster when

focusing on continuous feedback, as illustrated by one participant:

> *"If you do it right, you will notice much earlier if something goes in the wrong direction. This early warning system would be sometimes beneficial in sales in order to notice when you have to steer against it to get the deal. A warning system would be created with agile in sales and that would be a big advantage." Eric, VP Sales*

Overall, respondents indicated the benefit of creating transparent communication and feedback

loops within the sales team and with customers in order to continuously improve. This continuous improvement clearly would lend itself to satisfying the need for SDT's need for competence.

Common Process

The theme of having a standardized and repeatable process as practiced in agile methodologies

was termed "common process." A common process provides the sales representatives with orientation points throughout a sales cycle. It might also include the integration and standardization

of certain actions across the whole sales organization. A common process can help a salesperson

structure their own process with a customer but can also support sales managers and technical

salespeople to better manage and allocate resources to individual accounts. Respondents did not

refer to the common process as having the same individual selling strategy, but rather described

a formal process which is put around their internal and external interactions. The theme was also

mentioned in relationship to speaking a common language within the sales department. The following quote refers to the benefit of a common process by one respondent:

> *"The main benefit I see is putting a process around interactions with your customer, engagement on true feedback, as well as the sharing. [...] I am a process sales guy anyway; I don't think that sales is about being a natural salesperson that can sell anything. I do believe if you follow a good process on your sales, you can be successful." – Steve, VP Sales*

As the customer requirements and the environment are constantly changing, a common process can provide a sense of stability to sales teams. By identifying a common process, sales teams could be more productive and successful. Again, this improvement in efficiency should relate to increased levels of competence, per SDT.

Team Cohesiveness

When implementing an agile methodology, everyone works closely with one another in a self-organized team. During each meeting, team members should support each other by sharing their experience and providing suggestions. All aspects related to sharing knowledge, supporting, and encouraging each other in all processes refer to the theme "team cohesiveness". The benefit of self-organized teams is illustrated by the following respondent:

> *"The ability to do that and have those leaders from within, people that don't necessarily have a leadership title, but are providing daily leadership in small groups and teams and rallying people around things that are important to the business are invaluable to a team's success." – David, VP Sales*

While many salespeople work remotely from their home office, stronger team cohesiveness can also be gained by sharing experiences, best practices, and learnings within the team via phone calls. Through close communication within the team, feedback can be provided to each team member constantly, as stated by one respondent:

> *"No matter where you are, you feed off encouragement. So, I think another benefit of agile could be to being able to hear 'good job' from a multiple number of people, but you are also be able to hear 'you need to do a little bit more'." – James, Account Executive*

As team members are involved in all processes, a team's sense of unity may be increased. By discussing each salesperson's tasks and obstacles, salespeople learn to support and count on each other. Respondents mentioned that receiving different perspectives and suggestions can be valuable when focusing too much on closing the deal with one customer or being too deep into the process. These different perspectives can lead to greater levels of competency, fulfilling that SDT need. This unity also fosters a sense of relatedness, which reflects the desire to feel connected or close to others in the SDT framework (Deci & Ryan 2000).

Customer Collaboration

The theme of receiving feedback from the customer and working together on the sale was termed "customer collaboration." Agile methodologies encourage the close relationship between the organization and the customer. Customer collaboration might also refer to having a meeting or demo of the product/service every week or two weeks at the customer's site. Through the meeting, the sales organization can benefit from direct feedback and high customer involvement in the process. One participant stated:

> *"I think the main benefit of being agile is staying current with the customer demand […] There are multiple benefits which will come from that. You will have more sales because you are addressing what they want. So, staying agile and current with the customer demand will keep us aligned with where the customer wants to go." – Robert, Account Executive*

Furthermore, the sprint reviews in Scrum provide the teams with the formal opportunity to receive feedback from internal and external customers. The benefit of closely collaborating with

customers in order to avoid providing a solution that is misaligned with the customer's needs

and values was also mentioned by another sales representative:

> *"The smart salespeople will make sure that the customer is part of that creative process. So, you are getting buy-in and validation from the customer. Also […] you are not spending a lot of hours and days, building a solution that is just not going to work for the customer. The more you bring the customer into that creative process the more agility you are going to build into your sales motions." –David, VP Sales*

Having a close customer collaboration and continuous feedback could not only help each individual salesperson on their messaging and sales strategy but could also support research and development in creating better products. Thus, collaboration meets the needs of both competence and relatedness (closeness to customer) per SDT (Deci & Ryan 2000, 2002).

Tracking Progress

The theme termed "tracking progress" emerged as a benefit to salespeople and is highly used in agile methodologies. Scrum uses the burn-down chart, which is a visual measurement tool that ensures projects stay on track, in order to monitor the progress of specific tasks. Within sales, tracking the progress refers to the benefit of checking upon daily goals and sales targets. One respondent, who implements a Scrum/Kanban approach within sales shared his positive experience:

> *"Oh, we have this event and we want to have 100 people. And the sign-ups will stop two weeks in advance, so we have 5 weeks to go, so that means 20 sign ups every week. So how is that progressing? It helps us a lot in seeing." – George, Partner*

Tracking the progress within the sales cycle was also considered beneficial in order to increase the predictability of sales. The respondents described the tracking practices such as the burn-down chart as a visible tool to see how active each sales team member is and how the team

progresses in each stage of the sales cycle. Tracking is expected to lead to greater efficiency, which meets SDT's need for competence, as described earlier.

Urgency

One of the main events of Scrum is the daily 15-minute team meeting to check upon their tasks, alignment, and obstacles. Forty percent of respondents mentioned that they could see the benefit of this agile practice during an intensive time on a project or if the sales cycle with the customer is very short. Hence, this theme was termed "urgency." The following respondent mentioned the importance and benefit of staying aligned during those times through Scrum calls:

> *"[...] if there is something that has an increase in a sense of urgency and importance, we will often have data plot checking calls in the morning, just get the team on the call for a status update. What worked in the last 24hours, making sure each is aligned. You have a 15 minutes call, each and every day. [I could see the benefit] if you got an opportunity or challenge that is very critical to the organization and you have a group of people working on it." — David, VP Sales*

As the above quote illustrates, participants could see the benefit of a daily call if there was a critical opportunity or urgency to the organization. Again, this fits well into the framework of SDT through meeting the desire to feel competent.

Accountability

The last theme related to benefits emerged when respondents were asked about their perception of the daily Scrum call. Participants mentioned the benefit of accountability. The theme "accountability" involves the benefit of each salesperson being responsible for their tasks and promises that each person has committed to during the team meeting. The sales team and the sales manager could then verify what each person is going to work on and if they have achieved their plans. For example, the following quote illustrates accountability for one individual:

"You know the Scrum piece [...] I like that idea to some degree for sales force. Because you are getting people to say out loud what they need to get down, so there is no hiding of it. So the next day, did you do it or didn't you? Right, it's white or back." — *Steve, VP Sales*

This increased accountability would likely contribute to feelings of competence, thus meeting this need of SDT.

Impediments

The second category, which emerged from the interviews, were hindrances and problems when implementing and practicing an agile method in sales. Table 3 provides an overview of the eight impediments identified in the coding process. Many of the following themes would detract from a sense of autonomy, the remaining component of SDT which involves feelings of initiative and choice (Deci & Ryan, 1985).

Theme	Definition	Frequency (max. 12)
Individual result driven	Salespeople tend to be more focused on their own results rather than the team's results.	8
Demand on resources	Resource costs associated with time and infrastructure changes within the organization.	7
Resistance to change	Salespeople's preference to stay in their comfort zone and follow the process they are used to as long as it works for them.	9
Unpredictable nature of sales	Progress is highly dependent on customer changing requirements and speed. Sales is considered as an art.	7
Geographic separation	Salespeople are spread apart geographically and do not meet in person with the team on a regular basis.	6
Communication issues	The burden of many internal meetings, which might overlap with client's meetings.	6
Diverse customer base	Salespeople work separately on different and individual accounts. Individual knowledge about their work might not be useful information to share.	6
Individuality	Salespeople's working styles and processes can be very diverse and individualistic.	5

Table 3: Definition and frequency of identified impediment themes

Individual Result Driven

One of the core principles of agile methodologies is to work within a team. The theme "individual result driven" refers to the salespeople focusing mainly on their own results rather than the team's results. Examples of this theme include salespeople being driven by their personal results, such as reaching his or her own sales quota and the associated rewards. The following two quotes illustrate how individual result driven salespeople might hinder the strong collaboration needed within an agile methodology:

> *"So in America, salespeople receive individual bonuses. [...] The problem with that is that it creates knowledge holding. And Scrum is not about holding anything, it is about total transparency." – Andrew, Agile Coach*

> *"One senior salesperson that I talked to said 'there is a lot of white noise in this job, but at the end of the day and at the end of this year, you are judged on one thing, how close are you to your number?' Having a meeting every single day, ultimately, is that what will bring me closer to my number? And I don't know." – James, Account Executive*

As illustrated, the compensation structure as part of salespeople's individual result driven character, might present a drawback. The performance measurement of sales representatives based on individual quotas instead of the ability of creating a scalable, repeatable, efficient sales pipeline, might impact the success of agile methodologies in sales. Thus, this focus on the individual correlates with autonomy, and thus it appears that these sales representatives feel that agile methodologies could detract from this autonomous nature of sales.

Demand on Resources

The theme "demand on resources" refers to the amount of time required to adopt the new agile methodology, the money which must be invested, and the processes which have to be changed in order to move from a traditional to an agile sales organization. Implementing an agile

methodology often requires some effort in aligning existing infrastructures with new technologies that improve the heavy communication of the team, as stated by the following agile expert:

> *"[...] there are infrastructure changes that need to be made to facilitate people's success." – John, Agile Coach*

As illustrated, adopting an agile methodology requires a sales organization to invest in resources, which could hinder them from implementing these methods. This demand on resources would likely lead to a decrease in perceived competence, according to SDT.

Resistance to Change

When companies go through restructuring of methodologies, it not only requires the investment of resources, but also the giving up of old habits and trying out new strategies in order to continuously improve. This theme was termed "resistance to change." One respondent mentioned his concerns:

> *"Typically, salespeople, especially if they have been in the business for quite some time, they have their own process of what they do. Now we can tweak that process and do different things, but inherently they kind of have their [own] process of what they are doing. So, I think that would be a big challenge for existing salesforces."— Steve, VP Sales*

This impediment was noted by upper sales managers who have managed salespeople for many years. They found that salespeople who have been successful with their own process for a long time are the slowest to adapt and change their habits. It takes them longer to realize that changes must be made to their current sales strategy. The quote above refers throughout to sales representatives having their "own" processes; thus, it seems that this belief about agile methodologies could detract from a sense of competence.

Unpredictable Nature of Sales

The theme "unpredictable nature of sales" emerged as respondents felt that sales cannot adopt an agile methodology due to its unpredictability. Salespeople stated that their work highly depends on the changing requirements and speed of their customers and seems unpredictable, for example:

> *"You don't have control over your customer, you only have control over your world. The process is predictable, but sales is unpredictable." – Hannah, Senior Sales Manager*

Moreover, several respondents referred to sales as being an art. Examples of the unpredictability of sales can also be seen from the high number of different sales books, selling strategies, and sales methodologies mentioned by participants. Moreover, respondents seemed to struggle to plan a one- to four-week agile sprint or commit to certain tasks they will work on during the next 24 hours, as described by one respondent:

> *"I think the team's days are so dynamic. They don't know what the day brings [...] So the level of detail that they [salesforce] are able to commit to, would be something they would need to figure out." – Steve, VP Sales*

Furthermore, when asking the interview participants about their perception of agile in software development versus agile in sales, most participants also referred to the unpredictability:

> *"My understanding, if you are working on a single software code, it is much simpler. I am going to fix these 5 bugs and get out the next channel of the code by the end of the day." – Steve, VP Sales*

It can be inferred from these examples that this theme could potentially detract from the need for autonomy of SDT, reflected through the desire to control one's schedule and one's art.

Geographic Separation

Inevitably, many sales representatives work remotely. While the agile methodology focuses on the importance of having face-to-face team conversations, the theme "geographic separation" was identified as an impediment for an effective implementation of agile methodologies in sales

(Beck et al., 2001). Salespeople are spread apart geographically, often across different time zones, and cannot meet in person on a regular basis. The following quote illustrates the difficulty of not having all team members in one office:

> *"The problem with sales is, because we all cover such a wide range of accounts and we are located at different areas, it sounds like the most effective way for a Scrum or sprint to happen would be in person. But I could really see it being effective and I am sure they probably already do it in R&D and Marketing, but for sales it is such a unique thing [...] it would be tough to have a weekly get-together, when we are all so spread apart."*
> *– James, Account Executive*

This finding may point to a belief that agile methodologies would take salespeople away from selling, which would detract from feelings of competence per SDT. This also seems to point to competence being a stronger need for sales representatives compared to relatedness.

Communication Issues

Another theme related to impediments was termed "communication issues" and emerged when respondents were asked if they could imagine implementing a daily Scrum call within their team. Communication issues refers to the respondents' concerns of communicating too frequently and sharing unrelatable information with each other when adopting an agile method. Examples of that issue included that salespeople felt that they were already meeting too often and exchanging a lot of information. Instead of spending time sharing knowledge and progress with other team members, upper sales representatives stated that they would rather have their salespeople prospecting new customers or spending time with their current customers:

> *"If I have an extra half an hour, I would rather have my folks on the phone prospecting and looking for other opportunities than being in a meeting." – Hannah, Senior Sales Manager*

Furthermore, the theme also refers to the issue of aligning internal agile events such as sprint planning and sprint retrospective with external customer meetings, as stated by the company implementing a daily call in their sales team:

> *"[...] your internal rhythm regarding planning, demo, retro, daily as such – in a sales environment that is sometimes challenging. Because you have customers who want something at a certain time or want a meeting at a certain time and you have your own internal meetings." – George, Partner*

This potential impediment to implementing agile methodologies may be based on a perceived lack in effectiveness. Thus, again, it seems that the need for competence in SDT outweighs the need for relatedness among salespeople.

Diverse Customer Base

The theme "diverse customer base" refers to the difficulty of working in a team with agile practices when each individual sales representative works separately on their individual customer accounts. Each account might be very different. Examples of this theme include the focus of each salesperson on their own set of accounts, the difference between each account, and the different products they sell to each customer. The following participants mentioned that sharing knowledge and providing feedback within the team might be totally irrelevant when having broad portfolios and implementing different products with each customer:

> *"I think if you have a lot of product to sell, it is very difficult, because your sales force, your sales teams, this [rep's] quarter may be dependent on two of his accounts buying infrastructure, another person over here might be dependent on selling services for this current time period. So, sharing those experiences while interesting, is not very relevant." – Steve, VP Sales*

> *"I am not building an end product, like if you do if you build a car, or you are building software. I have my own set of accounts. So what I do is not affecting what my colleague does necessarily." – Hannah, Senior Sales Manager*

As indicated by the last quote, salespeople compared their sales context to the implementation of agile methodologies in software development or when building one product. Participants perceived it to be more difficult to sell different products to multiple individual accounts than to sell one product to a similar customer base. Many respondents mentioned that they find it difficult to adapt an agile methodology when working on so many different things within each account, while for software development, team members overall work separately towards the same product. This impediment would seem to decrease feelings of competence and perhaps autonomy as well (SDT).

Individuality

The theme "individuality" reflects respondents' perceptions that every salesperson has their own individual working style and process. As agile methodologies emphasize that all team members follow one common process, respondents feared that their diverse working styles could hinder the implementation of a common process. While a common process was valued as a broad guide by many respondents, they feared that a specific framework could impact the success of individual salespeople:

> *"If I have sales reps that are successful, extremely successful, and they kind of have their own way of working, you don't want to force someone to change that. There is an individual component to any sales job." – Hannah, VP Sales*

Having one's own style fits well with the need for autonomy per SDT. Thus, it seems that this impediment would decrease feelings of autonomy.

Success Factors

The third main category identified is termed "success factors." These consist of factors that participants believed to be necessary for the successful implementation of Scrum within sales. Table 4 provides a brief description and the frequency of the five identified success factors.

Theme	Definition	Frequency (max. 12)
Agility mindset	Refers to the salespeople's mindset to adapt to change, be experienced, and be a team player.	10
Individual commitment	Buy-in of each individual salesperson and employee to adhere to the method.	9
Training	Education and reinforcement of the methodology.	7
Organizational commitment	Importance of middle management support and vision of agile adoption across the organization.	5
Allowance for mistakes	Organizational culture should allow employees to make mistakes and learn from them.	4

Table 4: Definition and frequency of identified success factor themes

Agility Mindset

The theme "agility mindset" refers to the salesperson's mindset to adapt and change their behavior according to customer or team situations as well as leverage team and company resources. Participants mentioned that their ability to be agile could be developed over time. The following respondent illustrated the importance of having an agility mindset to implement an agile methodology:

> *"If you have an agility mindset but no agile strong process, you might just say, we don't have a process, we are just flexible and do whatever we want. So, you need to have both*

to really have the benefits. If you have either one of them [but not both], you are missing out on something at least." –George, Partner

Agile methodologies welcome changing requirements to satisfy the customers and to provide them with a competitive advantage. Respondents identified that in order to leverage agile practices and welcome changing requirements, they need to completely understand their solutions and the customer value proposition in order to adapt appropriately. These findings were consistent with the characteristics of agility selling and should contribute to a greater sense of competence (SDT).

Individual Commitment

The "individual commitment" theme reflects the need for members to adhere to the agile methodology. Since agile methodologies emphasize frequent meetings and teamwork, this theme relates to the necessary buy-in and commitment of each individual salesperson to adopt the method. Several agile events and practices are based on mutual support and providing valuable feedback to each other. Respondents emphasized the importance of commitment and willingness of each individual to communicate more than they are currently do. The following three respondents described the required attributes of individuals when implementing an agile methodology:

> *"But the challenge with solving out a sales methodology is that you've got to be committed to using it, making sure everyone is applying it on a daily basis, or you wasted a lot of time and training and money on a program or methodology that your entire team did not adopt and it falls apart pretty quickly." – David, VP Sales*

> *"It would have to be a buy in from every individual."—Hannah, VP Sales*

> *"It takes someone who has more invested in the organization than just a paycheck." – John, Agile Coach*

SDT has shown that individuals will gravitate towards situations that allow the three needs to be met (Deci and Ryan, 2002). Because of this gravitation, level of commitment should increase as the needs for autonomy, competency, and relatedness are met. Thus, to achieve this individual commitment, these factors must be at play.

Training

The "training" theme reflects the need for training to fully understand and adopt agile methodology. This is illustrated below:

> *"I have to make sure that they will adopt those behaviors needed in this methodology. And this is why the coaching lasts for weeks and weeks." – Tim, Agile Coach*

> *"Training your people to make sure they can use the tool effectively, so that they don't get frustrated [...] revisit how it is going and reinforcement that this has to be part of how we do business, is widely important." – David, VP Sales*

Respondents also mentioned that pilot projects in small sales teams, before rolling the new agile methodology out across the whole sales organization, could increase the success of an agile transformation. Training should increase feelings of competence, thus satisfying that SDT need.

Organizational Commitment

The "organizational commitment" theme relates to the importance of having a company vision about the agile transition as well as executive management and field management support. Respondents identified this theme as crucial to sales organizations as most of the salespeople are spread across the country. This theme is illustrated below:

> *"It starts with executive support. You have to make sure that middle managers support as well. The salesperson, the individual contributor, who is out there in some remote office, he or she is not going to call the CEO in a large organization and wonder if they should be adopting this new sales tool or sales methodology. He or she is going to his manager. So the support of those field managers is really key. Making sure that they are consistent with the message coming from corporate is really key." – David, VP Sales*

> *"Anything organization-wide, you can cast visions, but ultimately unless people buy into that vision, it is just a vision." – James, Account Executive*

Again, commitment should increase when the needs for competence, autonomy, and relatedness are met per SDT.

Allowance for Mistakes

Inevitably, when adopting a new methodology, people tend to make mistakes. Agile methodologies encourage taking risks and making mistakes in order to apply valuable learnings to the customer journey. This theme reflects that salespeople need the organizational support to make mistakes and also be able to tolerate it in themselves. This success factor is illustrated by the following:

> *"I think the biggest bottleneck [...] might be where people are not allowed to make mistakes. Then it makes it hard to make changes because people are afraid to make a change. Because every change is a possibility to make a mistake. The more people are afraid of making mistakes, the harder it is to adopt this mindset and process." – George, Partner*

As indicated by this quote, having the mindset of embracing mistakes as an opportunity for growth and as a valuable learning experience is an important component of a successful agile methodology adoption. Through this mindset, feelings of competency (SDT) will not be as diminished as they would if mistakes are viewed negatively.

Discussion and Implications

The purpose of this study was to explore the use of agile methodologies in B2B sales. Overall, several themes emerged from the data that provide meaningful insights into this research topic. These themes fit well within the theoretical framework of self -determination theory (SDT). The category of benefits seems likely to increase primarily feelings of competence, along with relatedness. The category of impediments seems likely to decrease feelings of autonomy and

competence. As research on motivation and SDT has shown, individuals are more likely to act in ways that support meeting these needs (Deci and Ryan, 2002). These findings also add support to the research on SDT, by illustrating how these needs may at times come in conflict with one another, as can be seen in the impediments section. It seems that sales representatives may value autonomy and competence more highly than relatedness when these needs are in conflict.

Below, the four research questions of this study are addressed and managerial implications will be discussed.

RQ1: Which agile methodologies are currently used in sales?

Only one company was practicing a mix of Scrum and Kanban with their sales teams. When asked why so few companies implement agile methodologies in sales, the sales representative mentioned that sales teams are usually not familiar with agile methodologies or do not know that they could be applicable in sales: "*I guess the main thing is 'agile is for IT' or at least that is the mindset of people. So, we are sales, so we cannot do agile*" (George, Partner). Even when working in the software industry, salespeople are not familiar with agile methodologies or assume that they can only be implemented within software development.

Overall, sales organizations tend to mainly operate based on more traditional approaches, are less familiar with agile methodologies, and thus are not implementing those in practice. Nevertheless, salespeople emphasize agility selling and are inherently practicing some values and principles within their current sales process. However, based on the excellent results seen in the two case studies outlined earlier, sales forces would be wise to adopt agile methodologies such as Scrum.

RQ2: What are advantages in implementing agile methodologies in sales?

The benefit category (continuous improvement, common process, team cohesiveness, customer collaboration, tracking progress, urgency, and accountability), which emerged from the interviews, provides insights into current sales challenges that could be addressed through an agile implementation in sales. Approximately seventy percent of respondents saw an advantage of having a common process and focusing on continuous improvement as practiced within agile methodologies (see Table 2).

According to Cameron et al. (2016), perhaps the greatest challenge sales executives face is the inability to generate enough qualified leads. This could be addressed by the benefit theme of "continuous improvement," identified by over 80% of participants. Through the constant inspection and adaption of each individual salesperson's performance and the customer's needs, new opportunities within existing customers might be leveraged. By constantly holding retrospective meetings within the sales team and focusing on customer feedback, this research found that agile methodologies could provide an early warning system for sales executives to tackle problems faster. When problems come up faster, the challenge of a long sales cycle could be diminished. Furthermore, these findings can address sales challenges related to the lack of a common sales process and an ineffective sales process, noted as one of the biggest barriers to achieving sales objectives (Cameron et al., 2016). By tracking each salesperson's progress within the sales cycle (another benefit mentioned by 58% of respondents), executives might also be able to address the challenge of having an inaccurate forecast (Cameron et al., 2016). Overall, the themes in this benefit category could improve the performance and efficiency of sales organizations.

RQ3: What could prevent sales organizations from implementing agile methodologies?

Out of the eight impediments that emerged (individual result driven, demand on resources, resistance to change, unpredictable nature of sales, geographic separation, communication issues, diverse customer base, and individuality), some might be more addressable and controllable and thus provide more direct managerial implications than others. These impediments also point to some of the perceived differences between software development (where agile methodologies are frequently used) and sales.

As agile methodologies strongly emphasize team collaboration, mutual support, and knowledge sharing, the impediment of "individual result driven" could highly decrease the chance of a successful implementation of agile methodologies in sales. As many sales representatives are individually incentivized, this paper recommends that sales organizations could either solve this problem by introducing team-based elements to their compensation models. The company Zappos for instance strongly promotes a collaborative mindset between employees through a "co-worker bonus award" (Pontefract, 2015).

The second most frequent impediment was termed "demand on resources." This is faced daily by many organizations and might be best addressed with the success factor theme "organizational commitment." The research suggests that a properly implemented vision and mission for agile methodologies should explicitly include the allocation of necessary resources, such as funding for training and infrastructure changes. While the theme "unpredictable nature of sales" might seem less controllable and addressable, it is important to note that agile methodologies actually help to reduce this impediment. As agile methodologies are focusing on tracking and collecting data in every step, an agile implementation could diminish the unpredictability of the sales process. This research suggests various metrics should also be consistently tracked to reduce the unpredictability of sales.

When facing the impediment of geographical separation for daily scrums and team meetings, sales executives might have to be a bit creative. This paper suggests that sales managers should leverage today's communication technologies to overcome the distance between sales team members. While agile methodologies emphasize face-to-face contact, sales representatives should be given the opportunity to hold team meetings via phone or video calls. This might slightly diminish the positive agile effect of high team cohesiveness; however, it still provides an opportunity to share best practices and progress easily and often. Concerning the perceived high frequency of the meetings, sales organizations should be given the freedom to determine the number of meetings per week. This could reduce the theme "communication issues" that salespeople feared when implementing the required daily meetings of agile methodologies. Nevertheless, sales managers should still ensure that their sales representatives come together physically at times to take advantage of tacit knowledge sharing and team building.

RQ4: What are critical factors in implementing agile methodologies in sales?

This research provides insights on critical factors (agility mindset, individual commitment, training, organizational commitment, and allowance for mistakes), which are necessary to implement agile methodologies successfully in sales. While some can be interpreted as general success factors when implementing any new methodology, the themes "agility mindset" and "allowance for mistakes" can be especially seen as key factors relevant to sales organizations when implementing agile principles and values. This research found that the theme "agility mindset" is a critical success factor when implementing agile methodologies in sales. This paper concludes that an agility mindset depends on other emerged success factors and might be accomplished through training or creating a culture that encourages experimentation and learning from mistakes.

Limitations and Future Research

Although this research provides insights into agile methodologies in sales, it includes some limitations. First, results were based on a limited sample size. Even if quotes might have varied from respondents of different regions within the US and other countries, overall the emerged themes seem to be robust. Second, all sales interview participants were working in the software industry. Empirical studies on agile methodologies with a greater sample size and across industries could reveal the extent to which similar benefits, impediments, and success factors occur outside of software sales. Third, the study interviewed sales representatives who were compensated on an individual basis. Therefore, some of the themes which emerged in relation to the individuality of salespeople might have derived from the compensation structure of the sample. Hence, future researchers might want to take sales organizations into consideration that focus on a team-based selling approach and team compensation system. Future research on best practices of agile methodologies in sales could bring valuable insights to sales organizations. Further, it would be illuminating to test the proposed conflicts of SDT in this context. For sales representatives, it seems that competence and autonomy are more important than relatedness. Examining this in different company cultures would be interesting. For those companies that do offer more team-based compensation and team selling in general, would relatedness still appear to come in third place?

A literature search yielded scant research on the adoption of new processes among a sales force, with the exception of sales technology adoption. While the adoption of agile methodologies is not technology per se, there are likely many similarities. Jelinek et. al. (2006) found in a longitudinal study that training, customer pressure, and peer use are important factors in sales force automation (SFA). Homburg, Wieseke, and Kuehnl (2010) show the impact of leaders and

coworkers on salespeople's SFA adoption; this paper further points to the importance of training and support to superiors to impact SFA adoption among salespeople. Perceived usefulness and ease of use of the SFA were found to be strong influences on managers. These factors that have been found to impact technology adoption could be examined in the broader context of sales process adoption, such as agile methodologies.

Conclusion

The study contributed to the current academic research by providing insights into current practices of sales organizations, their perception of agile, and their adoption of agile methodologies in sales. The majority of research conducted to date provides limited insights into the applicability of agile methodologies in sales. These insights provided through the current research should allow managers and sales representatives to critically examine their current sales practices and to make some needed changes that will benefit them in competing in the current sales environment. This research adds to the support for self-determination theory and points to some interesting conflicts that happen in a sales context.

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Appendix

Semi-Structured Interview Guide for Sales Representatives and Managers

Company/Role
- How long have you been working in Sales?
- How long have you been with this company?
- What position do you currently hold?
- Could you please describe your role and some of your projects
  and tasks?

Company/Sales department
- How is your organization structured?
- How is your sales department structured?
- How does your current sales process look like?
- How long is a typical sales cycle?
- How are your interactions and collaborations within the
  sales team and the other departments internally?
- How would you describe the mindset of the sales force?
- How does your product development department and sales
  department interact with one another?

Agile methodologies (if have experience with agile methodologies)
- How familiar are you with agile methodologies?
- How familiar are you with agility selling?
- Have you worked with agile methodologies such as Scrum
  or other methods in the past?
- How would you define agility and agile methods in sales?
- How agile is your sales process?
- How agile are your salespeople?
- Could you please provide an overview of the agile methods
  you are currently implementing or have implemented
  in the past?
- Could you imagine implementing Scrum in your team? If
  so, how? If not, why not?
- What are benefits in implementing agile methods in sales?
- How could your customers benefit from an agile approach?
- Could you see your customer being more involved in the
  sales process?
- How could your team benefit from closer collaboration?
- What are impediments when implementing agile methods
  in sales?

Agile methodologies (no experience with agile methodologies)
- How would you define agility and agile methods in sales?

Semi-Structured Interview Guide for Sales Representatives and Managers (cont'd)

-How agile is your sales process?
- How agile is your salesforce?
- How could you see your sales department and salesforce
becoming more agile?
- Do you see any benefits in implementing agile methods in
  sales?
- How could your customers benefit from an agile approach?
- Could you see your customer being more involved in the
  sales process?
- How could your team benefit from closer collaboration?
- Could you imagine implementing Scrum in your team? (following description of
Scrum)
- Do you see any impediments when implementing agile
  methods in sales?
- What would need to change (organization, department,
  culture) in order to become agile?

Software development vs. sales
- Do you see Scrum being a sales framework or just a software
  framework?
- Do you think this framework is easier to implement in
  software development? Why?
- How is implementing agile in sales different than in product
  development or IT?

Last thoughts
 - Can you think of anything else relevant to this topic that
  you would like to share?

Semi-Structured Interview Guide for Agile Experts

Company/Role
- How long have you been working with agile methodologies/ Scrum?
- What position do you currently hold?
- Could you please describe some of your projects and tasks?

Sales teams and agile methodologies
- With what type of sales organizations do you work?
- What is your experience in implementing agile methods/ Scrum outside of software and product development?
- Do you have some examples of the implementation of agile methods/Scrum outside of software development? What other departments?

Agile in sales
- Do you have any experience of implementing agile methods/ Scrum in sales?
- How could agile methods work in sales?
- Can you provide or imagine any examples of the implementation of Scrum in sales?
- How could sales benefit from agile?
- What success factors have to be in place in order to implement Scrum?
- Can you think of any impediments when implementing agile methods/Scrum in sales?
- What would need to change (organization, department, culture) in order to become agile?

Software development vs sales
- Do you see Scrum being a sales framework or just a software framework?
- Do you think this framework is easier to implement in software development? Why?
- How is implementing agile in sales different than in product development or IT?

Last thoughts
-Can you think of anything else relevant to this topic that you would like to share?