**INCENTIVIZING SALES TEAMS TO SUPPORT CATEGORICALLY DIFFERENT SERVICE PORTFOLIO EXTENSIONS: A QUALITATIVE STUDY OF FNINACIAL VALUE-ADDED SERVICES AT LOGISTICS SERVICE ROVIDERS**

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1. **Introduction**

In recent years, overall industry growth for logistics service providers (LSPs) has been modest. At the same time, the trend for profit margins has stagnated at low rates or even decreased in the course of the last ten years (BCG, 2017). In order to stabilize or increase profitability, LSPs therefore need to lower costs or alter their revenue streams. To increase revenues beyond just delivering more of the same services at a lower price, LSPs can develop new or enhance existing business models for value-adding service offerings in their portfolio (Baron et al., 2014). For example, they can provide value-added services in the areas of information- and communication systems, manufacturing, and facility or financial services.

With respect to financial value-added services (FVAS) there are many ways how LSPs can add value to their clients through externally completing business processes. However, LSPs that are mainly familiar with selling logistics services might encounter challenges – in particular its sales team – when offering such new financial services. From the perspective of a LSP, financial services require a fundamentally different set of competencies, which effects the required qualification and motivation of sales teams in the first place. For example, sales people will now have to talk to the financial department (and not to the logistics or purchasing department) of their clients and thus have to be profoundly knowledgeable about the financial products they offer and inherent financial risks*.* Therefore, in order to be able to create additional value with FVAS, LSPs needs to adapt new knowledge and skills (Prockl et al., 2012). In particular, it is highly critical that the existing sales team gets equipped with expert support, trainings, and tools to compensate the missing expertise. Likewise, the sales force has to be motivated to adapt the new knowledge and sell FVAS to new contact persons (now the financial department) of its customers.

A number of studies has focused on how to incentivise sales teams, among others at financial institutions, in general (see for example Ahearne et al., 2010, and Fu et al., 2010). However, these studies have not focused on the topic of how sales teams at LSPs can be qualified and motivated to offer FVAS. Against this background and in accordance with the identified research gap, this paper tackles the following overall research question (RQ):

*RQ: How can sales teams of LSPs be incentivized to support categorically different service portfolio extensions in form of value-adding financial services?*

The paper aims to derive impulses for incentivizing sales teams to promote services that are categorically different to the ones prior offered. In particular, it tries to give impulses on how diverse issues regarding qualification and motivation can be addressed to foster the development of a relevant and promising service offering. It is important to note, that the paper focuses on a specific part of the front-office. It assumes that the respective back-office and hence the organization in question is actually able to provide FVAS. Though this condition is not naturally pre-existing, such an assumption enables a clear focus on the main topic this paper examines.

In order to answer the research question, a qualitative approach is chosen (Silverman et al., 2016). The applied research methodology encompasses 34 expert interviews that have been conducted throughout 2017 by academic researchers in Germany, Italy, the Netherlands, Switzerland, and the UK. To provide the reader with comprehensive insights, companies of different sizes, origins and types have been selected. From those 34 semi-structured interviews, 26 are held with representatives of LSPs. The remaining eight interviews are conducted with customers of such LSPs to complement the picture of the industry landscape. 16 of the 26 interviewed LSPs actually offer FVAS and are examined closer in this paper.

The paper is structured as follows: First, the two important dimensions qualification and motivation of sales teams are elaborated from an academic perspective, drawing back on the *modern expectancy-value theory* by Eccles and Wigfield (2000). Second, different FVAS offered by LSPs are categorized. Following this, the impacts of different service portfolio extensions on required qualification and motivation of LSPs are elaborated and incentive systems to adjust qualification and stimulate motivation of sales teams are introduced. Third, incentive systems used in practice to adjust qualification and stimulate motivation of sales teams of LSPs are presented. Fourth, the findings from the interviews are discussed and a table is derived, which indicates both qualitative and motivational incentive measures to overcome the gaps identified. Fifth, a conclusion and outlook is given.

1. **Theoretical background**

Motivation and incentivization of employees have for several decades been subject to behavioural research. There exist different avenues to approach this topic. One prominent approach is the ability-opportunity-motivation model by Ölander and Thøgersen (1995). Following this model, one needs the opportunity, the ability, and the motivation to exhibit a certain behaviour (see Figure 1). The paper at hand examines how extending the product portfolio affects both the required ability (hereinafter equated with the term qualification) and motivation, while the opportunity is regarded as given as we focus on a specific part of the front office.



Figure 1: Theoretical framework for the paper at hand following Ölander and Thøgersen (1995)

With regard to the dimension of motivation, this paper relies on the *modern expectancy-value theory* established by Eccles and Wigfield (2000), which defines task-specific motivation as the product of an individual’s expectancy about his performance and result and the value he perceives from fulfilling the task.

* 1. **Impact of categorically different service portfolio extensions on required qualification and motivation of sales teams at LSPs**

Financial services are naturally different to transportation and logistics services as the former processes the flow of intangibles, such as money, and the latter the one of tangibles, such as goods. To enable a differentiation among relevant FVAS, this paper splits financial services into categories according to their distance to the core service offering of LSPs. *Table 1* shows the definition of each category, ranging from Category *Basis* (closest to LSP core business) to *Category C* (furthest to LSP core business).

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| **Category** | **Definition** | **Example** |
| FVAS Basis | Services that are technically financial services but are closely and commonly tied to the core service offering of transportation. | Customs clearing |
| FVAS A | Financial services that are closely related to the core service offering of LSPs but not necessarily logically tied to it. Services in this category do not require specific financial expertise. They are merely the external offering of basic competencies that LSPs holds internally. This category can be seen as outsourcing financial parts of administrative work. | Invoice management; Exchange of information with bank |
| FVAS B | Financial services that typically surround the core service offering of LSPs. These services are in some distance related to the core services but rather loosely. Offering them requires dedicated capacity and basic financial expertise. They are not logically tied to conventional transportation and logistics services and are traditionally performed by financial service providers. | Collection of accounts receivable without ownership of goods; Insurance of goods without ownership |
| FVAS C | Financial services that are only loosely related to the core service offering. Such services require high financial expertise and noticeable capacity at LSPs. Partly, being able to perform these services uses up liquidity or even necessitates a partner from the financial industry. | Ownership of goods; Dynamic discounting; Reverse factoring; Financing of fixed assets |

Table 1: Categories of financial services from a LSP-perspective

This paper makes use of the above defined categorization. It is to note that due to their conventionality, FVAS belonging to *Category Basis* will not be considered further. In the following, the impacts of a service portfolio extension through value-adding financial services at LSPs are analysed and clustered along the remaining three categories.

***Impact on qualification:*** Specifically looking at sales employees of LSPs, it is common that they went through a hauler or forwarding agent apprenticeship before switching into a sales-oriented role. Even for the instances in which this does not hold true, most sales team members at least worked several years in the industry. It is therefore reasonable to assume that members of sales teams of LSPs exhibit the necessary product or service knowledge of their industry to sell logistics services and financial services that are closely related to their traditional portfolio (Kaschek, 2002). However, the impact of a service portfolio extension at LSPs on the required qualification of the sales teams substantially increases, the “further away” a service is to the core logistics services.

As illustrated in *Table 1*, the financial services in *Category A* are administrative services such as invoice management for which LSPs generally possess competencies internally. Offering and promoting such value-adding services is not too distant for sales teams of LSPs. Deriving from this example, it can therefore be assumed that the knowledge that underlies financial services from *Category A* is within a fair range of expectations of logistics sales teams. The impact of service portfolio extensions from *Category A* on the required qualification of sales teams is rather low.

However, services from *Category B* or *C* require greater financial expertise. According to standard literature, such expertise is not necessarily present in logistics sales teams. Following the argumentation of Dench (1997), this knowledge gap impacts the ability of the sales teams to fulfil the need to know about products or services their organization offers. Not being able to provide sufficient and hence credible information about respective services in a portfolio extension affect the customer purchasing decision. In the end, sales teams need to receive education and gather knowledge about value-adding services as products are increasingly sold with complementary services (Gieseler, 2009).

In sum, the expertise necessary to promote financial services is commonly not adequately present in sales teams of LSPs. Services from *Category A* are a stated exception and might partially be able to be promoted due to their short distance to core logistics services. For the remaining services, literature suggests that additional expertise is necessary. Missing qualification in the form of missing expertise to adequately present FVAS therefore greatly affect the motivation of sales teams.

***Impact on motivation:*** With regard to the dimension of motivation, this paper relies on the *modern expectancy-value theory* established by Eccles and Wigfield (2000). Eccles and Wigfield (2000) define task-specific motivation as the product of expectancy and value. Expectancy is driven by the two addends performance expectancy and outcome expectancy.

*Performance expectancy* nearly fully relates back to the concept of qualification. In an ideal state, an increase in qualification influences the performance expectancy to the same extent. Considering the assessment of the impact of categorically different service portfolio extensions on the qualification of sales teams, this construct can be represented as a given in the current assessment of impact of said extensions on the motivation. The overall effects are covered in this paper but – due to the categorization – the necessary incentive systems will be addressed with regards to qualification.

*Outcome expectancy* is a construct that generally adds little to the motivation in this equation when used for sales processes. Ultimately, the purchasing decision resides at the customer. In the business environment of sales, this construct is therefore a constant low and does hardly affect the motivation sales teams experience for a specific task (Brösamle, 2015).

The paper therefore focuses on the impacts and incentive possibilities for the value factor. Eccles and Wigfield (2000) identify three addends of value, which can be denoted as incentive and attainment value (hereinafter referred to as intrinsic value), utility value, and cost (Brösamle, 2015).

*Intrinsic value* describes the joy and value the performance of the task brings to the individual. The “joy” of selling a FVAS can derive from the joy of selling in general and from the joy of working in this specific topic. It can be assumed that with a given base interest in the topic the joy of working on it proportionally relates to how comfortable a salesperson can deal with it. Thus, the building blocks of the intrinsic value construct can either be assumed to be constant or directly related to qualification –similar to performance expectancy.

*Utility value* depends on the goals of an individual. If one considers professional development as a key goal at work, the utility of the challenge of selling services form a categorically different portfolio extension might be rewarding in itself. For individuals that are rather setting their goals in terms of short-term performance and monetization, a challenging new task may need to be implemented in an institutionalized framework that comprises such goals. The utility value construct is therefore highly relevant for this paper. In the case of LSPs offering FVAS, sales people might experience the need for being knowledgeable about FVAS when clients actively ask for those services (market pull) and otherwise would consult a competing LSP.

*Costs* also need to be carefully addressed. The opportunity cost of putting effort into the sales of categorically different, new services is that the sales team of an LSP could use that effort to sell more of the traditional logistics services. Especially for individuals with utility values that are not long-term and development-oriented, this can lead to putting more effort into promoting services they are comfortable with and that will thus earn them more. It is critical, that FVAS are reasonably priced in into the overall rewards and compensation system.

In summary, an adaption of the *modern expectancy-value theory* indicates a strong link of motivation to qualification. The expectancy dimension seems to be greatly driven by the ability of an individual to perform the task. The value dimension consists of three constructs: intrinsic value, utility value, and cost. The analysis shows that also intrinsic value is directly related to the qualification. The utility value and the cost construct of motivation, however, indicate a strong dependency on short- and long-term motivational aspects. The value dimension needs to be targeted by specific incentives measures to have sales teams foster the promotion of FVAS. The resulting focus on qualification and the value factor of motivation applied in this paper make it possible to identify changing requirements and incentive alignment instruments in areas that can directly be measured and influenced by companies.

The overall impact of introducing FVAS are presented in *Table 2*, which represents the financial service categories introduced in this chapter and the two main aspects of changing requirements: qualification and motivation.

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| --- | --- | --- |
| **Category** | **Qualification** | **Motivation** |
| FVAS A | No considerable issues | Costs |
| FVAS B | Missing product knowledge | Utility value, costs |
| FVAS C | Missing product knowledge | Intrinsic value, utility value, costs |

Table 2: Impact of introducing FVAS on required qualification and motivation of sales teams at LSPs

Regarding qualification, *Table 2* shows that this dimension basically boils down to making sure the sales team achieves a certain degree of product knowledge. The analysis reveals that though expert status is not universally required within the personnel in the sales team, expert knowledge needs to play into the sales process. It is highlighted that for FVAS belonging to *Category A* the knowledge is partly already in place in existing sales teams of LSPs.

The implications for motivation refer back to the value dimension of the *modern expectancy-value theory* and its three constructs: intrinsic value, utility value, and cost. Intrinsic value must be tackled by making dealing with financial topics a comfort zone. This relates back to establishing expertise through qualification and is targeted by means addressing the qualification column. It is also suggested that costs and the utility value are sufficient motivation to promote services from *Categories A* and *B*. Intrinsic value in form of enjoying the sales of financial services due to a certain level of understanding of the products only becomes a necessity for services that are very distant to the core logistics service.

Utility value becomes important for FVAS from *Categories B* and *C*. Selling those services requires more effort than the ones from *Category A*. Therefore, costs are not a sufficient motivator. However, they are a key motivator throughout the categories. Decreasing costs by giving monetary incentives is a common incentive system in sales and an important transactional method. (Ferreira, 2017)

* 1. **Incentive systems to adjust qualification and stimulate motivation of sales teams**

***Qualification:*** General literature identifies three categories of systems that can incentivize sales teams in terms of lacking product or service expertise: expert support, training, and tools (Nieveen & Gustafson, 1999, Erffmeyer et al., 1992, Cron et al., 2005).

*Expert support* is the one quick fix method that could eradicate the lack of knowledge and hence incentivize the sales team to promote value-adding financial services amid missing expertise. Every sales team member of an LSP needs to have a clear and well defined big picture of the complete product and service portfolio. If this is not the case, it can be sufficiently helpful to be able to know where to find the expertise, i.e. to know the expert contact person (Kaschek, 2002).

*Training* is an intuitive idea when it comes to a lack of qualification – especially concerning product or service specific knowledge. In fact, most of the ongoing training provided in sales is for updating the knowledge about the offering (Dench, 1997). Concerning the affected services of LSPs from *Categories B* and *C*, trainings will inevitably vary with regards to intensity and volume (Duncan, 2018).

*Tools* represent the third set of incentive systems. They are a set of guides that help the sales team members to perform well with a specific client. In the context of LSPs, tools for FVAS illustrate best practices on how a salesman best explains a service, finds the right person to talk to at the client, or simply how to ideally initiate and process the expert support (Kaschek, 2002, Dench, 1997). A playbook or reference guide can for example give guidance on how to best structure an argumentation once the discussion exceeds a trainable depth.

***Motivation:*** It is empirically shown that the motivation to conduct a task and the effort that is put into it have a strong positive effect on the performance of sales team members (Brown & Peterson, 1994). Ferreira’s (2017) study on motivational factors in sales team management indicates that – apart from qualification – motivation is mainly dependent on the personal educational (*utility value*) and monetary goals (*cost construct*) of the individual. These two goals can be addressed with different sets of incentive systems.

*Utility value* needs to be targeted by awareness creation measures. Focusing on the company dimension, management can either hint at opportunities and emphasize client demand, or create a sense of urgency by addressing internal or industry pressure to change. Both directions can be powerful measures to mobilize the workforce and set free energy that incentivizes people to push forward (Bruch & Vogel, 2011). For example, a LSP could elaborate on the concept of rather positioning itself as a service provider for tangible and intangible asset flows (including LSPs) than as a service provider for pure logistics. If framed adequately, such a vision impacts the utility value construct and fosters long-term motivation.

*Perceived costs* of selling FVAS by an LSP can be diminished by setting monetary incentives. Setting such incentives allow to target sales goals directly and generally influence the motivation and self-organization of sales teams (Kaschek, 2002). Monetary incentives can be split into base payments and additional performance-based payments. Though an increase in base payment does have a positive effect on autonomous motivation, feasibility suggests to rather adjust the performance-based payment when supporting a service portfolio extension. This variable performance-based part of the compensation is commonly available in two forms: provision and bonus (Kuvaas et al., 2016) (Kaschek, 2002).

1. **Empirical results**

The interviews of 26 LSPs serve as a base for the research into practical experiences with offering FVAS. 16 of the 26 interviewed LSP representatives reported that their organizations actively offer FVAS. *Table 3* below gives an overview of how often a specific FVAS is mentioned and part of the service portfolio of the respective LSP.

It becomes obvious that no specific service category is offered significantly more often relative to others. The distance of a financial service to the core logistics service offering does not seem to affect the probability of a LSP to include the financial service in its portfolio in general. However, it has to be noted that reverse factoring – the service that arguably requires the deepest financial knowledge – is offered only three times.

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| --- | --- | --- | --- |
| **Category** | **Service** | **# of LSPs offering** | **% of LSPs offering** |
| FVAS A | Invoice management | 8 | 50% |
| Exchange of information with bank | 6 | 38% |
|  | Other: Factoring\* | 4 | 25% |
|  | **Average** | **6** | **38%** |
| FVAS B | Collection of accounts receivable without ownership of goods | 4 | 25% |
| Insurance of goods without ownership of goods | 6 | 38% |
|  | **Average** | **5** | **31%** |
| FVAS C | Ownership of goods | 8 | 50% |
| Dynamic discounting | 6 | 38% |
| Reverse factoring | 3 | 19% |
| Financing of fixed assets | 6 | 38% |
| **Average** | **5.8** | **36%** |

Table 3: Count and share of LSPs offering example FVAS

In the following, we take a closer look at how the interviewed LSPs tackled or plan to tackle the issue by installing incentive systems or procedures to adjust qualification and stimulate motivation of their sales teams.

***Qualification:*** The interviews indicate that the majority of LSPs offering FVAS installed specific structures that ensure an adequate supply of expertise to their sales teams. In particular, nine LSP representatives reported that their company installed structures that equips the sales teams with additional expertise. Three of these nine LSPs installed specific structures to provide expertise to the sales team right from setting up the business. They stated that such knowledge provision is rooted in their business model and that sales teams are built accordingly. Those companies therefore surely represent special cases but nevertheless support the conclusion that qualification would have otherwise been an issue.

One German LSP reports that its sales team works together in a cross-functional team with finance and R&D. The collaboration is enabled via a software that indicates which solutions can be offered for the specific client in general. R&D then customizes the base solutions further. The sales team serves as a mediator that receives the client request and enables R&D and finance to deliver on the request. Concerning success, the interview partner reports that especially ownership of goods and dynamic discounting are worthwhile as they equip their clients with freedom and flexibility.

Three other LSPs report they not only established a collaboration between the sales team and the finance department but a large-scale collaboration with a bank. One LSP actually has a bank in its corporate group that is providing guidance in deals that include financial services. Both constructs ensure a guaranteed influx of expertise as well as a common goal due to ownership. This service offering is considered as a valuable source of competitive advantage although the three LSPs only sell it to a small group of clients.

Moreover, one LSP set up a cross-divisional supply chain finance-team. The members of this team stem from the sales division and the financial department or in-house bank. On top of that, the company cooperates with five banks globally to make sure to incorporate local product knowledge. They claim this setup is a competitive advantage and servicing a client end-to-end is their business model.

In sum, the interviews suggest that the setting up of a formal structure to connect the sales team with financial experts – may it be to the finance department, to R&D, in a cross-functional team, or in collaboration with a bank – yields success. The interview partners that reported to have set up the structure initially in a way that ensures flow of financial information to the sales team add to the theme. Henceforth, qualification seems key and the provision via connections to experts preferred.

***Motivation:*** The *modern expectancy-value theory* indicates strong links of motivation to qualification. The utility value and the cost construct of motivation, indicate a strong dependency on short- and long-term motivational aspects. The drawn interviews support the view, that there are effects on the motivation of sales teams. However, fewer mentions have been made compared to the impact on employee qualification. It can therefore be argued that qualification seems to be the most powerful driver of motivation from the perspective of a practitioner.

In general, the interviewees report a positive impact on motivation when sales employees see the services as a valuable support to their logistics services. Therefore, the mind-set within the LSP allegedly considers anything that helps the core service not only useful but as a source for competitive advantage. Employees are incentivized and motivated by the overall success of the company and therefore care about any service that drives overall success.

Concerning incentives for the *utility value*, the interviewed LSPs also hand insights. By offering and delivering financial services to clients that demand it, retention and loyalty increases which in turn has a reported positive impact on the motivation of sales teams. The whole purpose of the offering is to gain a competitive advantage and improve customer loyalty. As this seems to be communicated well to the sales teams, motivation increases. Only few LSP representatives mention the existence of measures targeting motivation via the *cost construct* of the value dimension.

Concluding, the interviews do not hold as rich information on incentive systems to stimulate motivation as they do for the adjustment of qualification. Then again, the latter stimulates the former, hinting at it being a huge lever. While only little data is provided on monetary incentives, two examples suggest that addressing the utility value of motivation is an important part of incentivizing.

1. **Discussion**

*Table 4* summarizes and combines the findings from literature and the expert interviews on the topics of qualification and motivation as they are elaborated in the previous sections.

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| **Category** | **Qualification** | **Motivation** |
| FVAS A | Supplementary training | Monetary incentive |
| FVAS B | Expert support, auxiliary tools, supplementary training | Awareness building (driven by data), monetary incentive |
| FVAS C | Expert support, auxiliary tools, profound training | Awareness building (driven by personal engagement and data), monetary incentive |

Table 4: Incentive measures to adjust qualification and stimulate motivation of sales teams at LSPs to sell FVAS

In general, literature identifies three categories of systems that can incentivize sales teams regarding a lack in *product or service expertise*: expert support, training, and tools. Whereas expert support is a solution external to the sales team, training and tools aim to convey the knowledge into the sales team itself. Adding the perspective of practitioners, expert support seems to be best practice. While for FVAS relatively close to core business (*Category* A) supplementary training seems sufficient to overcome knowledge gaps, auxiliary tools and expert support are necessary to be competent for FVAS of *Category B* and *C*.

Concerning incentive systems to stimulate *motivation*, literature identifies two types based on the utility value and cost constructs of the *modern expectancy-value theory*. The first type regards awareness creation by data or personal engagement. The second type circles around monetary incentives in form of provisions and bonuses. The expert interviews confirm that awareness creation and monetary incentives are relevant topics. While sufficient for *Category A* FVAS, it is not feasible to motivate sale teams only monetarily for FVAS in *Category B*. If sales employees do not understand the urgency of promoting rather sophisticated FVAS, the monetary incentives come costly and deals are less likely to be finalized. However, data-driven means might be enough to convey the message on this level. For FVAS far from the LSPs core business (*Category C*), those data-driven means alone are not sufficient, as they cannot create enough relevance to overcome significant knowledge gaps. Instead, personal engagement has to be fostered – sales people have to experience the need to acquire the financial product knowledge, for example by realizing that customers will otherwise switch to a competitor.

1. **Conclusion**

This paper studies how sales teams of LSPs can be incentivized to support categorically different service portfolio extensions in form of value-adding financial services. Overall, literature identifies three categories of systems that can incentivize sales teams regarding a lack in product or service expertise: expert support, training, and tools. Adding the perspective of practitioners, expert support seems to be the preferred solution for FVAS that are only loosely related to the core offering of LSPs. A major learning from the interviews is that most LSPs address incentive problems with qualification. Concerning incentive systems to stimulate motivation, awareness creation through data or personal engagement and monetary incentives in form of provisions and bonuses are most relevant.

Considering *limitations*, the two sources of data need to be separated. For the literature review, source texts are not always exclusive to the industry of LSPs. General observations about sales teams in comparable scenarios are taken and adapted where needed. Concerning the expert opinion and experience that is drafted from the interviews, the interview sample and setup limit the findings of this paper. For the sample, only 26 of the 34 interviews are with actual LSPs. Of those 26 only 16 offer FVAS.

This paper provokes the need for*further research* for different fields within business studies. For example concerning the concept of motivation, it would be interesting to examine how the components of expectancy that are not directly linked to qualification are affected by offering FVAS at a LSP. Further, it should be investigated to which extent LSPs differ from other service providers and where eventual commonalities exist. Other studies might investigate how FVAS could best be implemented on an operational level at LSPs and which spill-over effects FVAS have on other services provided.

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