

## Tacit cognitive resource and its effect in personal selling

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### Abstract

*This study investigated difference with expertise in the relation between the intentions and situational behavior of the initial meeting with a new customer in personal selling. Three kinds of mental resource that influence on the intention and situational behavior was hypothesized. They were a) organizational policy of selling, b) action goal and its implementation intention, c) purport of the meeting and its implementation intention which consists of example actions and particular attitude set. In the experiment, after effective and less effective salespeople were given an organizational policy of selling and the information of a prospective customer, they reported what they would prepare to do for the initial meeting. Then they watched a video picture of the meeting and assessed a model salesperson's behavior as well as reporting the actions that they would have made. The difference in the intentions was found and the difference well explained the two groups' situational behavior.*

**Key Words:** Intention, Situational behavior, Expertise, Personal selling, Cognitive approach

### 1. Introduction

Recently salespeople are required to acquire skills to propose attractive business solutions for their customers instead of merely selling products and to maintain a good relationship (Ishii & Shimaguchi, 1995). The skill requirement has been one of driving powers of researches on salesperson's knowledge about customers and procedures of business communication. Cognitive approach to personal selling has revealed knowledge differences, both declarative and procedural, between effective and ineffective sales people (Leigh & McGraw, 1989; Leong, Busch, & John, 1989; Matsuo, Hosoi, Yoshino, & Kusumi, 1999; Sujan, Sujan, & Bettman, 1988; Szymanski, 1988; Weitz, Sujan, & Sujan, 1986); the common assumption is that a salesperson's knowledge of selling situations significantly influences on their effective sales communication with customers. Declarative knowledge provides a database for recognizing customer types, needs, and the sales situation, and procedural knowledge activates procedures and actions that should be used in a specific business situation (Weitz, et al., 1986).

Though previous cognitive researches have externalize (Nonaka & Takeuchi, 1995) the tacit knowledge of effective salespeople, the knowledge is only one of resources which are available to make salespeople efficient in an actual selling situation. They will not totally rely on situational cues that activate relevant knowledge. They are sure to make preparations before they visit to their customers.

The situational preparations will influence on effectiveness of selling practices at a certain business scene. However, very few researches have paid attention to preparations before salespeople visit their customers (Itoh, Hirata, Matsuo, & Kusumi, 2001).

This issue relates if spontaneous responses to the events in an environment can be explained by prior cognitive representations such as goals, intentions, and plans. Psychological studies have demonstrated that responses in the form of judgment, decisions, and actions were evoked spontaneously when we perceived information which relates to a goal we are pursuing (Bargh, 1989; Bargh & Gollwitzer, 1994; Gollwitzer & Moskowitz, 1996, Hamilton, Katz, & Leirer, 1980). However, the tasks in those studies were simple like person perception, memory task, and word problem. In addition, goals were always given. In work places even if we are given a same distant objective, individuals has his or her own goal and behaves differently. Behavior will be emerged in the form of perception, judgments, decisions, actions, manners, negotiations, explanations and other responses. Experts are supposed to generate higher mental resources that are brought into practice so that they can efficiently initiate and smartly organize those responses.

The purpose of this study is to clarify what goals and intentions salespeople previously generate and how these higher mental resources consistently initiate situational responses. We presuppose three kinds of higher mental resources. The first one is organizational policy of selling, which guides plans and strategies of sales. Matsuo & Kusumi (2002)

found “customer orientation belief” that regards customer’s satisfaction as important and “goal achievement orientation” in which increasing sales volume is a matter of the highest priority.

The second one is salesperson’s action goal and its implementation intentions for the coming visit. Bargh & Gollwitzer (1994) discussed that implementation intention rather than goal intention initiates spontaneous goal-directed behavior when one perceives certain situational cues. While goal intention specifies a certain end outcome, implementation intentions are subordinate to the goal intention and specify the when, where, and how of actions leading to the goal attainment (Gollwitzer, 1993), it is to say that implementation intentions consist of examples of the goal-directed situational action. Aarts & Dijksterhuis (2000) showed that habitual actions are automatically linked not to relevant situational events per se but to the mental representations of the goal pursuits they serve. On the basis of these researches, hypothesis 1-1: effective and less effective salespeople generate different implementation intentions in the pre-visit phase. As a result, hypothesis 1-2: the differences will be reflected on the perception of the situational cues and the actions in the meeting with the customer.

The third one is purport of the meeting and its implementation intentions. Purport is the reason why one has a certain goal or the effect at which an activity aims. It guides how the goal should be attained. Purport works as another goal and its implementation intention consists of two components. One is examples of situational action and the other is getting a particular attitude set. The examples will initiate similar actions in an appropriate local situation. The attitude will consistently guide one’s emotional, cognitive, and behavioral responses when one interacts with others and some classes of circumstance (Katz, 1960; Rosenberg & Hovland, 1960). Action goal implementation intentions guarantee behavioral efficiency and purport implementation intentions, especially particular attitude, control behavioral consistency. Hypothesis 2-1: effective and less effective salespeople show difference in the purport-relevant implementation intentions, that is, different example actions and/or different attitude set in the pre-visit phase. As a result, hypothesis 2-2: the differences will be reflected on the actions in the meeting. In case that they differ in their attitude set, hypothesis 2-3: the

difference is reflected on the behavioral consistency.

The purpose of the experiment is to clarify differences of effective and less effective salespeople in the pre-visit phase and in the initial meeting phase under the context of proposing business solutions instead of merely selling products.

## **2. Experiment**

### **Subjects**

The subjects were eleven high performers as effective and nine average performers as less effective, who were employed by ten branch offices in the Kanagawa prefecture area of an office machine supplier. Each of the high performers had attained the top-level sales figures in his branch office. Each of the average ones was in the lower middle range of sales volume in the same office. All had more than three years of sales experience (male, age 25-36). The high performers’ age range was from 26 to 32. Their selling experience was from 2.5 to 7 years (average was 6.8). The average performers’ age range was from 25 to 36. Their experience was from 3 to 11 years (average was 5.7).

### **Material**

We formed a 10 minute video by extracting sequences from a sales training video prepared by the Sanno Institute of Management. The video picture consisted of two parts. The first part (3 minutes) showed an organizational policy of selling and a brief explanation of a prospective customer. The second part (7 minutes) showed that a model salesperson making the initial call to the customer and making an unsuccessful pitch. The manager of general affairs who was the direct contact person came to the meeting together with a senior manager of planning division, who wanted to upgrade his office equipment and improve the work efficiency of his office staff. The senior manager expected the meeting. The “salesperson” had a dialogue with the managers and proposed his analysis before he sufficiently discussed their needs and concerns. The managers quickly lost interest in the meeting, but the “salesperson” did not notice the breakdown (Figure 1).

### **Procedure**

Every subject watched the first part of the video and then reported what actions he would make in the context of the situation displayed in order to prepare

for the sales call (preparatory actions), the pre-visit phase. Next, the subject watched the second part of the video. He was encouraged to pause the video whenever he saw a “poor” action by the “salesperson” and to report why the action was wrong (perception and assessment); he was also required to describe the action that he would have made (situational actions), the initial meeting phase. The experiment lasted about one hour. We collected the verbal responses on audio tapes and transcribed them.



Figure 1 Initial meeting scene

### 3. Result

#### 3-1 Pre-visit phase

The subjects’ verbal responses in the pre-visit phase were preparatory actions that they would have made, topics they would talk with the customer, goal of the meeting, and attitudes that they set. We analyzed the responses to find preparatory action units that were basically consisting of subject-verb-object with a subordinate phrase. Forty-nine action units were identified. Two evaluators who had over three years of business experiences were explained the experiment and independently grouped similar units. Fourteen preparatory action groups were identified; the inter-evaluator agreement rate was .78. The groups were classified into six categories in terms of their function in a business scene.

Table 1 shows the six preparatory categories, fourteen action groups, and frequency of each group’s action units. Before visiting the prospective customer, the subjects generated action goals as obtaining useful information and finding the customer’s needs, characterized the initial meeting as building a personal relationship, set an attitude, did preliminary study about the customer, prepared sales materials, and checked business manner. Action goal setting and its subordinate action groups in Table 1 correspond to the action goal and its implementation intentions. Characterizing the

initial meeting and its subordinate action groups as well as attitude setting correspond to the purport of the meeting and its implementation intentions. Based on the frequency of action units, generating the action goal and its implementation intentions and the purport of the meeting and its implementation intentions are, as expected, matters of high priority.

#### 3-1-1 Correlation between preparatory action group and sales figure

We analyzed correlation between frequency of action units of each group and sales figure of the high and average subjects. The analysis revealed that sales figure was positively correlated to only one group, “estimate chance of success” ( $r=.49, p<.05$ ) of the “Action goal setting” category. Though both the high performers and average ones considered the initial meeting as a chance of building personal relationship with the prospective customer and intended to obtain needs, problems and other useful information, only the high performers were ready to read the chance of success. Salespeople who attained higher result made themselves ready to supervise what degree they would persist to attain an action goal as well as its implementation intentions.

Table 1 Preparatory action categories, action groups, and frequency of each group’s action units

(n: frequency of action unit, N: total number of n, C: customer, \*: significant as per correlation analysis )

Pre-visit phase	n
<b>Action goal setting</b>	N=18
Obtain any useful information.	6
Collect the C’s needs and problems	6
Collect information about the C’s business	4
Estimate chance of success	2*
<b>Characterizing the initial meeting</b>	N=14
Build a personal relationship with the C.	7
Introduce my company to the C.	3
Introduce and sell myself to the C.	4
<b>Attitude setting</b>	N=7
Do not show selling attitude	7
<b>Preliminary study</b>	N=6
Make a preliminary study about the C’s company.	2
Study business trends in the same trade.	2
Consult with superiors to get advice and useful information.	2
<b>Preparing materials</b>	N=3
Prepare business cases in the same trade of the C.	2
Prepare the product catalogue.	1
<b>Manner check</b>	N=1
Should be careful about personal appearance	1

### 3-1-2 Preparatory action units of the high and average performers

In order to find difference between the high performers and average ones, we focused on what action unit could discriminate the subject groups. Discriminant analysis was used and fourteen variables were selected from the total of forty-nine predictor variables by the analysis. The correct percentage of classification was 95%. Table 2 shows each action unit, the category to which each unit belongs, and the results of Fisher's classification functions.

High-value units in the action goal setting of the high performers were "find the customers business direction", "observe and understand the customer's problem situation", "obtain any information that carries us to the next appointment." These units indicate that as for the action goal setting the high performers do not only focused on inconveniences of which the direct contact person complains but also they are particularly interested in the information that is necessary for them to understand the customer's problem situation. They also specified one concrete objective to be attained, that is, getting information that would carry them to the next appointment. On the other hand, though the average performers were

similarly interested in the customer's problem situation, they seem to concentrate on "problems" and not to prepare to find other kind of useful information. Nor they prepared for the meeting next to the initial one. These differences support hypothesis 1-1.

As for the purport of the meeting high-value units for the high performers were "talk business trend with the customer to stimulate their interest" and "do not sell but building a personal relationship with the customer". As shown in Table 2 both the high and average performers intended to "build a personal relationship", "talk market trend", and "understand the direct contact person". But the high performers were well discriminated by their focus on the customer's business and by combining an attitude with an example action. As shown in Table 1, the preparatory action group "do not show selling attitude" does not correlate with sales figure of the subjects. Simple attitude set may be a weak resource in the sense of initiating effective responses. It may become powerful when it is integrated into goal-directed implementation intentions. The high performers and average ones generate implementation intentions differently and this result supports hypothesis 2-1.

Table 2 Classification function coefficients: Preparatory action units which produced 95% correct classifications ( H: high performers; A: average performers; C: customer )

Preparatory action unit	Category in Table 1	H	A
Find the C's business direction.	Action goal setting	54.00	18.00
Observe and understand the C's problem situation.	Action goal setting	36.00	18.00
Obtain any information that carries us to the next appointment.	Action goal setting	36.00	0.00
Obtain useful information.	Action goal setting	18.00	0.00
Estimate how much interest the C has in our products.	Action goal setting	18.00	0.00
Inquire about inconvenience and good points in the C's office.	Action goal setting	18.00	18.00
Make the C have favor to us.	Action goal setting	18.00	18.00
Talk business trend with the C to stimulate their interest.	Characterizing the meeting	54.00	18.00
Do not sell but build a personal relationship with the C.	Characterizing the meeting	36.00	0.00
Build a personal relationship.	Characterizing the meeting	18.00	18.00
Talk market trend.	Characterizing the meeting	18.00	18.00
Understand the direct contact person.	Characterizing the meeting	18.00	18.00
Talk economy and management to stimulate the C's interest.	Characterizing the meeting	0.00	-18.00
Know which univ. graduate or hobby to find topics to share.	Characterizing the meeting	-36.00	-18.00
Constant		-26.9	-8.7

### 3-2 Initial meeting phase

#### 3-2-1 Assessment of the “salesperson” in the video

Both the high performers and average ones stopped the video picture at every scene in which “the salesperson” continued to speak his proposal without noticing the two managers’ facial expressions. Every subject reported that the “salesperson” must not rush out with his proposal but had to carefully listen and understand the senior manager’s problems and concerns. No difference was found.

#### 3-2-2 Situational actions

Every time the subject stopped the video picture, he reported the action that he would have made at the scene. We analyzed their responses to find situational action units in the same way as in the pre-visit phase. Sixty-two situational action units were identified. Similar units were grouped by the two evaluators into fifteen groups; the inter-evaluator reliability was .75. The groups were classified into five categories in terms of their function in a business communication scene.

Table 3 shows the five situational categories, fifteen action groups, and frequency of each group’s action units. In the initial meeting the subjects, as a whole, tried to obtain useful information from the customer, introduce products, control attitude with good business manner, and successfully finish the meeting. Frequency of the units indicates that “obtaining useful information” is the most important action.

#### 3-2-3 Correlation between situational action group and sales figure

We analyzed correlation between frequency of action units of each group and sales figure of the high and average subjects (Table 3). The analysis revealed that sales figure was positively correlated to three groups; “talk to and observe people other than the direct contact

” ( $r=.53, p<.05$ ), “obtain homework for the next appointment” ( $r=.46, p<.05$ ), and “listen attentively and take notes” ( $r=.45, p<.05$ ). These groups coincide with discriminatory actions of the high performers in the pre-visit phase. Implication of this result is twofold. One is that same assessment does not guarantee effective situational actions. The other is that these three situational action groups well reflect the high performers’ preparatory implementation intentions of action goal and purport of the meeting.

Though “make a new appointment” is similar to “obtain homework for the next appointment”, it does not specify what to do in the next meeting; meaning that the high performers are certain to get something that carries them to the next stage of the selling process, not simple next meeting, as intended in the pre-visit phase.

Table 3 Situational action categories, action groups, and frequency of each group’s action unit

(n: frequency of action units, N: total number of n,

C: customer, \*: significant as per correlation analysis )

<b>Initial meeting phase</b>		<b>n</b>
<b>Obtaining useful Information</b>		N=19
Inquire more about problems the C mentioned		9
Infer new problem and ask relevant questions		4
Talk with and observe people other than direct contact		4*
Collaboratively explore the possibility for the improvement		2
<b>Attitude control</b>		N=13
Do not show selling attitude		6
Keep the context under the salesperson's control		4
Listen attentively and take notes		3*
<b>Explaining products to the C</b>		N=13
Propose solution examples for the problems the C mentioned		4
Adaptively adjust communication by estimating trust		4
Show examples which are easy to understand		3
Effectively use catalogues and examples		2
<b>Finishing the initial meeting</b>		N=11
Obtain homework for the next appointment		6*
Make a new appointment		5
<b>Business manner</b>		N=6
Keep cheerful and well-mannered		3
Show thankful attitude		3

### 3-2-4 Situational action units of the high and average performers

We examined what action unit could discriminate the two subject groups. Discriminant analysis was used and fourteen variables from the total of sixty-two predictor variables were selected by the analysis. All actions produced 95% correct classification. Table 4 shows each action unit, the category to which each unit belongs, and the results of Fisher's classification functions.

Table 4(a) shows high-value units of the high performers and table 4(b) shows those of the average performers. The high performers "focus on topics agreeable to the customer", "probe the customer about their real interest and problems", and "wait for the customer's "we have a problem..."". They "do not push", "listen attentively and take note", and "concentrate on obtaining useful information for the meeting". On the other side, the average performers "ask more about needs and relevant information from the customer" as well as "present problems". They "offer solution plans to the problems" as early as in the initial meeting, though they claimed that the "salesperson" in the video must not rush out with his proposal but that he had to listen carefully and

understand the senior manager's concerns and problems. Their actions does not well coincide with assessment of the "salesperson", whereas the high performers' situational actions well coincide with their assessment.

The correlation analysis and the discriminant analysis support hypothesis 1-2 (behavioral aspect), 2-2, and 2-3. High performers' situational actions are successfully goal-directed. Those of average performers are less organized.

Concerning perception of contextualization cues we could not find clear difference between the two groups in the assessment. But when they reported their actions in the initial meeting phase some of the high performers paid attention to unexpected higher-level person's appearance in the meeting. The cue indicates that the customer has a serious problem worth listening and that the customer is expecting of the meeting. This subtle cue itself suggests the prospects of success. No average performers reported about it. This result is more powerful than that of assessment in showing high performers' scene sensitivity and supports hypothesis 1-2 (perceptual aspect).

Table 4 Classification function coefficients: Situational action units which produced 95 % correct classifications. ( H: high performer, A: average performer, C: customer )

Situational action unit (a)	Category in Table 2	H	A
Focus on topics agreeable to the C.	Obtaining information	18.00	0.00
Probe the C about their real interest and problems.	Obtaining information	18.00	0.00
Wait for the C's phrase " we have a problem...."	Obtaining information	18.00	0.00
Infer the situation from the higher-level person appeared.	Obtaining information	0.00	-36.00
No need to push our products to the C.	Attitude control	18.00	-36.00
Do not push sales hard - keep the meeting calm.	Attitude control	18.00	0.00
Listen attentively and take notes.	Attitude control	18.00	-18.00
Concentrate on obtaining useful information for the meeting.	Attitude control	18.00	0.00
Use examples and catalogue to explain merits.	Explaining products	18.00	0.00
Situational action unit (b)	Category in Table 2	H	A
Ask more about needs and relevant information from the C.	Obtaining Information	0.00	18.00
Ask the C about their present problems.	Obtaining Information	0.00	18.00
Offer solution plans to the problems mentioned by the C.	Explaining products	0.00	18.00
Use plain and everyday words.	Explaining products	0.00	18.00
Talk about problems mentioned by the C and relevant issues.	Explaining products	-18.00	0.00

## 4. Discussion

In this study we presupposed three kinds of higher mental resources that would initiate effective situational actions and control their consistency. They are a) organizational policy of selling, b) action goal and its implementation intention, and c) purport of the meeting and its implementation intention which consists of example actions and particular attitude set. In the experiment we examined difference with expertise in the latter two resources under the same organizational policy of selling.

In the pre-visit phase, as for the action goal and its implementation intention, high performers did not only focused on finding inconveniences of which the direct contact person complained but also they intended to collect any useful information in order to understand the problem situation and something that would carry them to the next meeting. Though average performers similarly intended to know the customer's needs and problems, they seemed to pay attention to what the direct contact person mentioned. They did not prepare for the meeting next to the initial one.

As for the purport of the meeting and its implementation intention, both high and average performers characterized the initial meeting as building a personal relationship with the customer and intended to talk business trend and market trend to stimulate the customer's interest. But high performers were discriminated by combining a particular attitude set with an action, that is, "*do not sell* but build a personal relationship with the customer". The both subject groups got a similar attitude set but the high performers skillfully set a certain attitude into implementation intentions.

In the initial meeting, the both groups assessed the "salesperson" as rushing to give his proposal and reported that he should have carefully listened to the senior manager to understand problems and concerns. Difference of the high and average performers' preparation was not reflected in the assessment. As to the actions that they would have made, high performers' actions well coincided with their preparatory implementation intentions and assessment. They restrained themselves from showing any selling attitude and concentrated on letting the customers feel free to talk by waiting and listening attentively. Average performers' reported actions coincided with their preparatory implementation intentions and did not with assessment, and they showed impatience of offering solution plans to the customer's specific needs.

The results indicate that implementation intentions

rather than their higher goal and purport of the meeting are powerful resources to guide, initiate, monitor, and organize situational actions, which supports Gollwitzer's discussion about implementation intention (Gollwitzer, 1993; 1999). The results also indicate that experts are highly skillful in generating effective implementation intentions and set the supervisory readiness before they go into selling practice. Difference in the implementation intention suggests that the high performers have a schema of wider scope of business process than the average ones. They were ready to place needs and problems in a wider situation, for example in the customer's business direction, and recognize the initial meeting as a chance of building the customer's commitment to move forward to their goal with the salesperson. "Find the customer's business direction", "observe and understand the customer's problem situation" and "obtain any information that carries us to the next appointment" in the high performer's preparatory actions support this interpretation. The high performers' supervisory readiness suggests that they are careful about organization of situational responses in the goal-directed way.

What is the implication of these results for selling? Why is it effective to take time in obtaining useful information by listening attentively without showing any selling attitude? The expected implication is following. When a customer can clearly articulate real requirements that include the goal to be attained and constraints to be solved or be avoided, a quick solution proposal will work well. Often, however, the customer fails to state the true problems or hidden constraints. Making quick solutions may invite repeated proposals without getting the customer's acceptance and will cause irritation. Proposing a ready-made solution does not always fit the real needs of the customer which may not be explicitly mentioned, because if a salesperson rushes to propose a solution and explain it, the customer will have virtually no chance to talk about related concerns or constraints.

This study showed that preparatory activity has significant influence on the situational actions and that the skill to generate implementation intentions is different with expertise. Actions in a scene are not always situated nor ad hoc (Suchman, 1987, 1994). Efficient responses to the expected and unexpected events in a circumstance can be explained by the preparatory behavior. Effective salespeople well externalized their tacit resources as well as making them operational in the form of implementation intentions and their supervisory attitudes. How different is the skill of generating goals, implementation intentions in other

domains of expertise? What kind of individual difference or historical difference influences on the skill? How experts prevent unexpected risks and troubles in advance? How they distribute intentions in case of directing teams? These questions have not had enough answers yet. We have to investigate these problems and try to give useful implications to domains of practice by externalizing tacit mental resources and their influence on situational actions.

Matsuo & Kusumi (2002) emphasized the ten-year rule of necessary preparation to the expert and the importance of instruction and deliberate practice. Considering any of high performers in this study does not have ten years of experience, clarifying expertise will contribute to design the learning environment to improve and accelerate skills in practice.

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