AMA SALES TRACK DISCOVERY SERIES · FINAL SESSION

Sales Force Management & Personal Selling

OHIO UNIVERSITY

Doing Impactful Sales Research

How to turn real-world sales challenges into theoretically meaningful, methodologically rigorous, publishable research — that also matters to practice.

For doctoral students and early-career sales scholars

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Experience Across Research, Teaching & Practice

Nearly every question in this session started in a conference room, a coaching session, or an assessment dataset…not a journal.

50+
SCHEY CORPORATE PARTNERS

70+
ORGANIZATIONS ASSESSED

12+
ENTERPRISE RESEARCH STUDIES

100+
CONSULTING & TRAINING ENGAGEMENTS

10,000+
SALES PROFESSIONALS DEVELOPED

1,000+
SALES LEADERS COACHED

5000+
UNIVERSITY SALES STUDENTS TAUGHT

SECTORS INCLUDE

MedTech · manufacturing · financial & professional services · technology · consumer · distribution · higher ed

Schey Sales Centre

University programs and 50+ partners: a direct line between classroom and field.

Tyson Group

Assessment, coaching, and CRM data: a living laboratory for research questions.

WHAT THIS MEANS FOR YOU

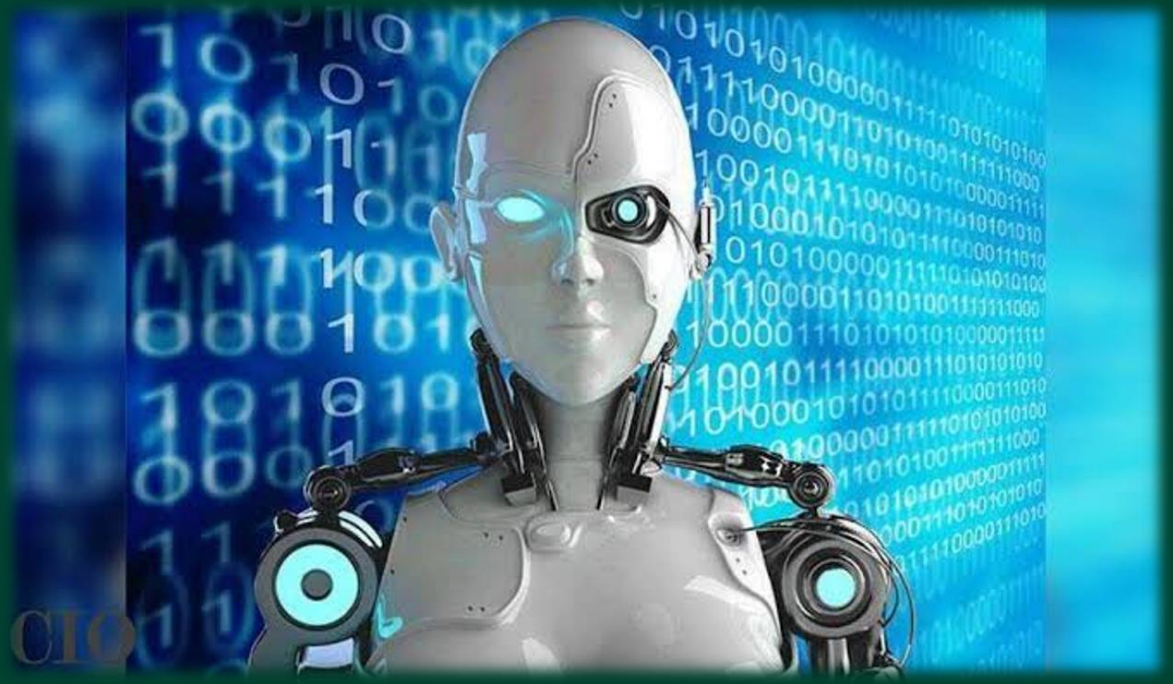
You can build a smaller version of this vantage point starting as a doctoral student.

THE UNCOMFORTABLE QUESTION

Would you feel comfortable leading a discussion with a CRO and the C-suite of a Fortune 500 company about the challenges their sales organization is currently facing?

Not presenting your dissertation. Leading the conversation.

FORTUNE 500



THE BAR JUST MOVED

With the help of AI, everyone is becoming an ‘expert.’

It has to be more than a PhD and a few papers.

WHAT STILL DIFFERENTIATES A SALES SCHOLAR

Genuine expertise
close to the phenomenon, not just the literature

Theoretical insight
explains why something works — and when it stops

Research rigor
can tell an executive whether a belief is true

Practical understanding
knows what a manager can change on Monday

Common Criticisms Across Three Domains

Research *Professors*

- **Too theoretical; disconnected from current problems**
- Publication cycles are too slow
- Findings aren’t actionable enough
- Research questions can be too narrow
- Limited access to modern sales organizations
- Doesn’t keep pace with technology
- Statistical novelty over managerial importance

Teaching *Students*

- **Limited practical business experience**
- Weak professional communication & judgment
- Difficulty handling ambiguity
- Insufficient customer-facing experience
- Limited resilience after rejection
- Gaps in workplace readiness

Practice *Sales organizations*

- Overreliance on anecdotes
- Management fads and buzzwords
- **Limited scientific validation**
- Short-term thinking
- Weak measurement
- Confirmation bias
- Rarely replicates what works

Common criticisms and perceptions. What each domain lacks, another one has. And every criticism is a research opportunity.

A Loop, Not a Line

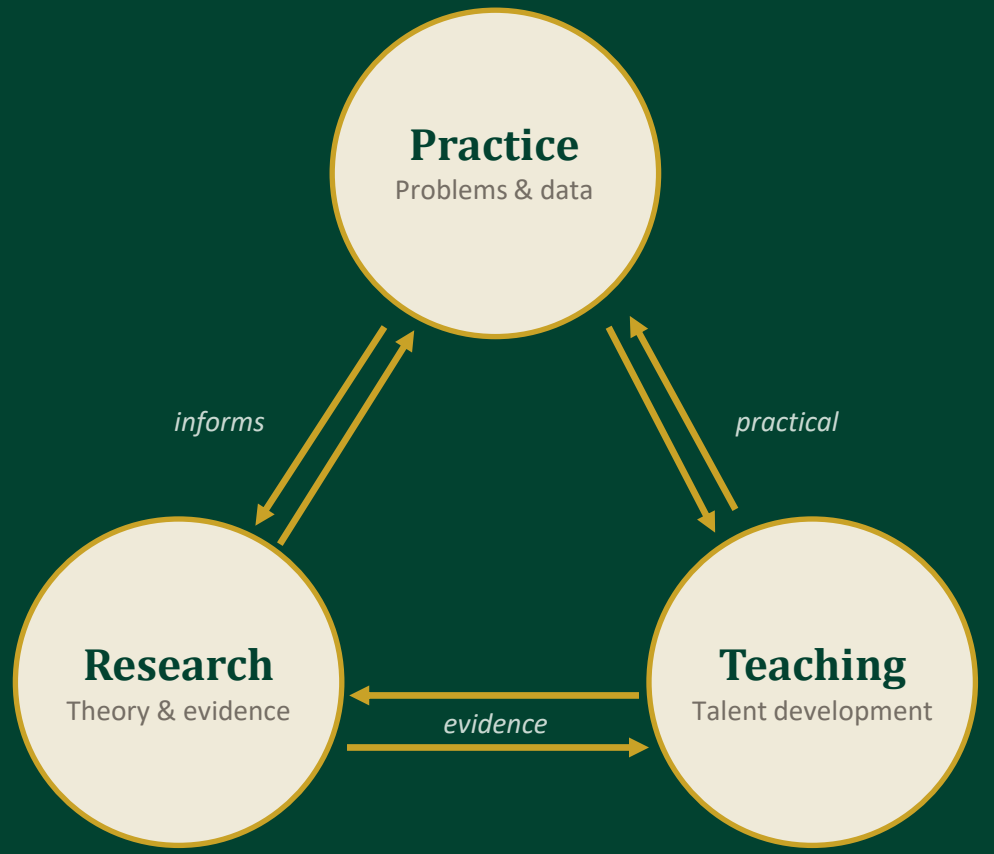
Research provides rigor.

Teaching develops capability.

Practice provides relevance.

But there is a HUGE disconnect. The usual model is a one-way pipeline — research → curriculum → practice … but, practice moves faster than research.

For doctoral students: the best entry point into the loop is practice ; simply, that's where the questions are!



Center of gravity: systematic, two-way exchange . Not a one-time hand-off.

Challenge Poll

What Is the Biggest Obstacle to Doing Impactful Sales Research?

Choose one and put the letter in the chat. Each option maps to a section of today's session.

A **Finding important research questions**

→ *Section 2*

C **Gaining access to organizations and data**

→ *Section 4*

B **Connecting practical problems to theory**

→ *Section 3*

D **Publishing rigorous research with managerial relevance**

→ *Section 5*

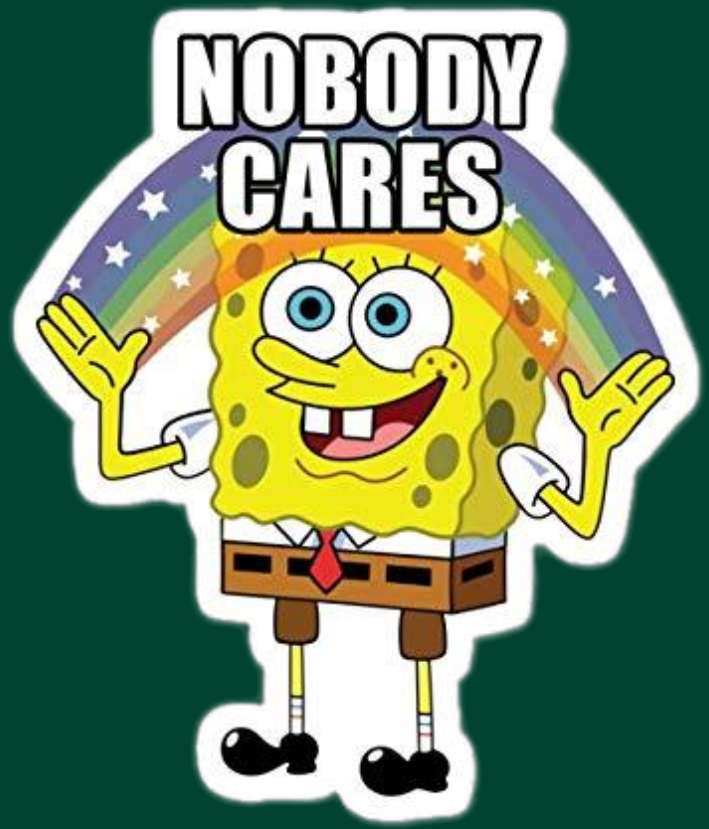


What are the most important research questions we should be investigating tomorrow?

…and who, outside our field, would care about the answer?

Sorry, but 99.9%* of the sales field doesn't care about your…

…structural equation model
…dissertation
…need for journal publications
…theory testing
…personal research interests
…literature review
…(fill in the blank)…



***…unless it ties to outcomes that matter to THEM!**

Where Meaningful Sales Research Questions Come From

In the room

Hear the problem in leaders' own words

- **Executive interviews & discussions**
- **Consulting engagements**
- **Coaching & training programs**

In the data

See what people do, not what they say

- **Sales competency assessments**
- **CRM & behavioral sales data**
- **Unexpected performance patterns**

In the tension

Where theory lives

- **Failed organizational initiatives**
- **New technologies & changes in selling**
- **What executives believe vs. what evidence shows**

Rule of thumb: the best questions live where smart people are surprised, disagree, or have spent money without getting results.

Three Tiers of Executive Questions

Each tier hands a researcher something different. The diagnostic tier is usually the sweet spot.

TIER 1

Strategic *The big-picture priority*

"How do we improve manager coaching effectiveness?"

"How do we integrate AI into the sales workflow?"

GIVES THE RESEARCHER
The phenomenon — and why it matters

TIER 2

Diagnostic *Is it actually working?*

"Why do my reps say they're not being coached when I think I coach every week?"

"Is our AI producing pipeline, or just more noise?"

GIVES THE RESEARCHER
The puzzle — and candidate mechanisms

TIER 3

Tactical *What managers face day to day*

"How do I coach effectively with 12+ direct reports instead of 8–10?"

"What's the ROI on the AI tools we already bought?"

GIVES THE RESEARCHER
Boundary conditions — and measures

Five Questions Executives Are Funding Today

WHAT EXECUTIVES ASK	WHAT A SCHOLAR CAN STUDY
01 How do we improve manager coaching effectiveness?	*When, why, and for whom does coaching change seller behavior and performance?*
02 How do we increase seller productivity without adding headcount?	*How do role design, time allocation, and enablement shape selling capacity and output?*
03 How do we integrate AI into the sales workflow?	*When does AI augment versus substitute for salesperson judgment and are there real benefits?*
04 How do we improve forecast accuracy and pipeline quality?	*What behavioral and organizational forces bias forecasts and pipeline data?*
05 How do we create consistent execution of our sales methodology?	*Why does methodology/process adoption decay after training and what sustains it?*

Moving From a Broad Concern to a Research Question

1 Concern	2 Phenomenon	3 Puzzle	4 Research question	5 Propositions
"Coaching isn't paying off."	*Same coaching program, very uneven results.*	*Why does it work for some reps but not others?*	*Under what conditions does coaching improve performance?*	*Coaching quality matters more when receptivity is high.*

Find the "but."
"We coach every week, but reps say they aren't coached." The "but" is your puzzle.

Name the tension with theory.
What would existing theory predict and why doesn't it hold here?

Make it bigger than one company.
If the answer only matters to this client, it's a consulting project.

Why the puzzle is real: in Kluger & DeNisi's (1996) meta-analysis, over one-third of feedback interventions decreased performance. More feedback is not automatically better.

Two Audiences, One Study

Academic contribution
Better understand the mechanisms and boundary conditions of coaching effectiveness.

Managerial contribution
Identify which coaching behaviors improve performance, for which salespeople, and under what circumstances.

An important business problem is not automatically an important theoretical contribution.

THREE TESTS FOR EVERY QUESTION

Theoretically interesting
Challenges an assumption or explains a puzzle (Davis, 1971).

Fail → a consulting report

Empirically testable
Constructs can be measured; rival explanations can be ruled out.

Fail → an essay

Managerially meaningful
Changes a decision someone actually makes (Jaworski, 2011).

Fail → a paper no practitioner reads

From “Are Reps Using AI?” to a Publishable Study

1

Theoretical question

When does AI augment versus substitute for salesperson judgment and for whom?

2

Mechanisms

Time shifted to customers · better preparation · stronger adaptive selling or deskilling and over-reliance

3

Competing explanations

Top performers adopt first (selection) · territory & product · novelty effects · manager encouragement

4

Data needed

Usage logs · rollout timing across teams · competency assessments · objective performance over time

5

Publishable when…

It explains who benefits and why (e.g., a staggered rollout ; difference-in-differences) grounded in task–technology fit



SAME LOGIC, DIFFERENT SETTING: COMPETENCY ASSESSMENTS

Practitioner: *“Do our assessments predict anything?”* → **Scholar:** Which competencies predict performance, under which selling conditions and do they change with development?

Task–technology fit: Goodhue & Thompson (1995).

Lead With Their Problem, Not Your Data Request

The ask that fails

"I'm a doctoral student and I need data for my dissertation. Could you send me your CRM data and survey your reps?"

The ask that works

"You mentioned coaching isn't translating into results. I'd like to help you find out which coaching behaviors matter, and for whom. You get a findings briefing; I publish de-identified results."

WHY COMPANIES SAY YES

- An independent, rigorous answer to a question they already pay to answer
- Benchmarks and diagnostics
- Access to talent and students
- Lower cost than a consulting firm

SETTLE UP FRONT — IN WRITING

- Confidentiality & de-identification
- Permissions & IRB
- Data ownership & storage
- Right to publish (review window, not a veto)
- Timeline & deliverables

Long-term relationships: deliver something useful before you ask for the next thing.

See Van de Ven (2007), Engaged Scholarship.

Positioning a Practice-Driven Project for a Strong Journal

	CONSULTING REPORT	JOURNAL ARTICLE
Starts with	The client's question	**A theoretical gap**
Answers	What happened here	**Why and when it happens anywhere**
Evidence	Descriptive, persuasive	**Designed to rule out alternatives**
Delivers	Recommendations for one firm	**New theory + implications for many firms**

POSITIONING CHECKLIST

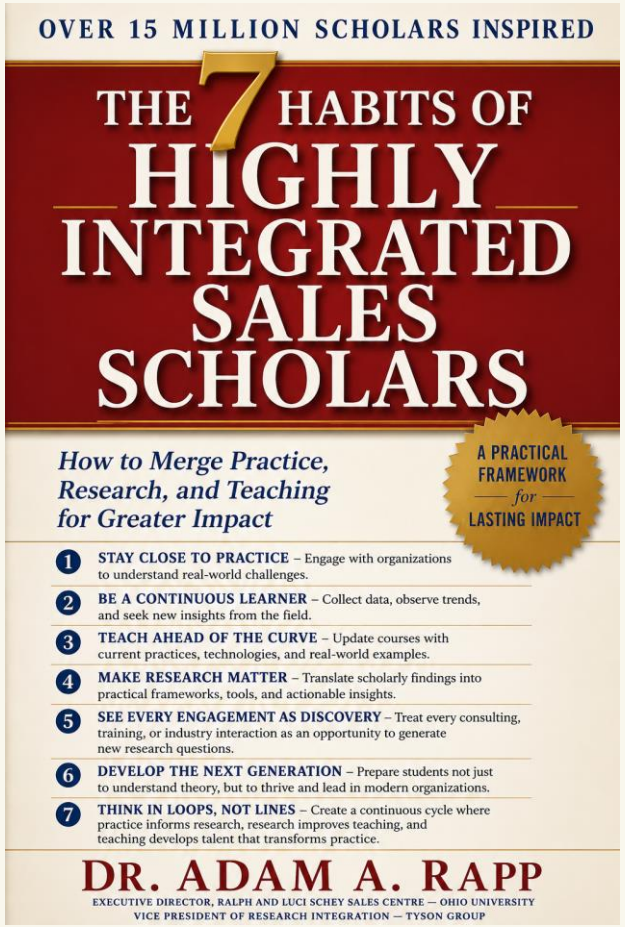
- ✓ Identify the theoretical gap
- ✓ Develop a compelling contribution
- ✓ Select methods appropriate to the claim
- ✓ Establish why the research matters
- ✓ Explain managerial implications concretely
- ✓ Avoid work that is merely descriptive or consulting-oriented

Rigor and relevance are complements. Relevance tells you which question to ask. Rigor tells you whether the answer is true.

On managerial relevance: Jaworski (2011); Lilien (2011), Journal of Marketing.

The 7 Habits of Highly Integrated Sales Scholars

Adapted for doctoral students and early-career scholars



1	**Stay Close to Practice**	Talk with one sales leader a month. Ask what keeps them up at night.
2	**Be a Continuous Learner**	Read practitioner sources and earnings calls alongside journals.
3	**Teach Ahead of the Curve**	Bring a live company problem into the class you teach or TA.
4	**Make Research Matter**	Write a one-page practitioner summary for every paper.
5	**See Every Engagement as Discovery**	Keep a “puzzle log” from every executive conversation.
6	**Develop the Next Generation**	Bring undergraduates into projects — they are tomorrow’s partners.
7	**Think in Loops, Not Lines**	Plan the article, the framework, and the classroom case together.

No Fortune 500 Access Yet? Start Here

Get close

- Attend practitioner conferences, not just academic ones
- Interview sales executives
- Connect with alumni

Get access

- Collaborate with faculty who have organizational relationships
- Partner with university sales centers
- Join industry-sponsored projects

Give value first

- Seek opportunities to work with organizational data
- Write practitioner-oriented summaries of research
- Build relationships before requesting data

The order matters: access follows a good question and value delivered.

Questions & Discussion

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