

# Instructing Students on the Use of Behavioral Assessment in Sales Hiring

William J. Jones, Akshaya Vijayalakshmi and Jenny Lin

**Purpose of the Study:** Widespread use of hiring assessments exists within the sales industry. Unfortunately, there is a relative absence of instructional tools on behavioral assessments in sales hiring within the marketing education literature and sales management textbooks. This study describes an innovation in sales education designed to enhance sales management students' abilities to be better users of behavioral assessments in the hiring of a sales candidate.

**Method/Design and Sample:** Twenty-eight students enrolled in a sales management course completed a survey to evaluate a project on sales hiring through behavioral assessment. Survey items were modified from previous research on the use of cognitive flexibility theory in marketing education. Items tapped constructs ranging from job search preparedness to self-confidence in applying the skills developed by the innovation. Students also assessed ads placed to hire a sales candidate, which were analyzed from the perspective advocated by the project.

**Results:** Students found the sales project to significantly improve their perceived confidence in sales hiring and job search preparation, and helped them to achieve knowledge of sales hiring and management in addition to traditional learning goals. Moreover, students indicated feeling more involved in class by working on the class project while having significantly more positive reactions to using the project to learn class material. Finally, students demonstrated preference for a job placement ad that highlighted principles from the sales education innovation.

**Value to Marketing Educators:** Although behavioral assessments are widely utilized in hiring sales personnel, the topic often receives minimal attention in sales education. Likely, this results because it is not easy to instruct on sales assessments without turning the sales management classroom into a graduate-level course on measurement theory. Our approach to instructing on behavioral assessments incorporates cognitive flexibility theory and scaffolds into a semester-long project on hiring a sales candidate. This article offers a step-by-step guide to implement a sales hiring project into a sales management or similar course.

**Keywords:** Sales Management, Behavioral Assessment, Cognitive Flexibility Theory, Scaffolding

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Marketing projects that emphasize cognitive flexibility yield substantial benefits to students such as increased satisfaction, involvement, and motivation as well as higher grades (Rinaldo, Laverie, Tapp & Humphrey Jr., 2013). By cognitive flexibility, we refer to projects that enable students to “go beyond the ability to merely reproduce the instruction they received, and instead to be able to independently apply the instructed knowledge to new situations that differ in their characteristics from those of initial learning” (Spiro & Jehng, 1990, pp. 164-165). Learning environments that promote cognitive flexibility are typically ill structured and complex, but return superior knowledge transfer among learners (Jacobson & Spiro, 1995). Such environments work best when allowing for scaffolding (Rinaldo, Laverie,

Tapp & Humphrey Jr., 2013). Scaffolds enable learners to complete tasks for which they are capable while receiving help from an instructor as needed. Here, we describe a sales management project, developed with cognitive flexibility in mind, on hiring a sales representative using a pre-hire behavioral assessment (hereafter behavioral assessment(s)). Our students will almost certainly not come to class equipped with advanced knowledge of measurement theory despite the possibility that their future jobs could require them to engage with sales assessments. Nevertheless, we can demonstrate, for example, domain specificity through a scaffold such as highlighting how traits embodied in consumer advertisements (e.g., consumer emotional intelligence) may be less useful in business-to-business sales

situations (cf. Kidwell, Hardesty, Murtha, & Sheng, 2011). This project seeks to address three specific issues identified in sales education: 1) the need to understand behavioral assessment issues and realize its importance in sales hiring; 2) the lack of introduction and capability to assess these tools in marketing classes; and, 3) the need for our students to solve real-world sales problems and be better prepared for the (sales) job market.

## PROBLEMS RELATED TO SALES COURSE AND CURRICULUM

Approximately 60% of large US employers now administer behavioral assessments to potential new hires (Weber, 2015). This trend underlines the high turnover among sales representatives across industries and the role of poor job fit in creating turnover (cf. Martini, 2012). For the purpose of identifying individuals with psychological traits that result in higher sales performance and higher job satisfaction rates (which lead to lower turnover rates), the adoption of behavioral assessments in sales hiring has proven highly successful. For a review, see Martini (2012). Despite widespread use, most major sales

management textbooks address behavioral assessment perfunctorily. Three major textbooks stand out. See Table 1 for an overview of what these texts offer. It should be noted that none specifically contain any type of exercises regarding behavioral assessments. As described in Table 1, the treatment of behavioral assessment by major sales management textbooks exists, but is minimal. When compared to the widespread adoption of behavioral assessment by firms involved in sales-related activities, it is apparent that marketing educators need to better equip their students with knowledge of how to be better users of these tools.

In this paper, we describe a project, developed over multiple semesters, through which students create their own behavioral assessments. Importantly, students are tasked with identifying psychological constructs that they perceive as related to sales representatives' behavioral fit and their relation to associated success factors for student-chosen companies. Assessment measures offer evidence for the value of this exercise in promoting learning of behavioral assessments and their application in sales hiring.

Table 1  
*Sales Management Textbooks Addressing Behavioral Assessment*

Textbook authors	Issues Addressed
Johnston and Marshall (2013)	Address the issue of behavioral assessment by describing psychological traits related to sales performance. Highlight how individual traits may be related to specific company strategies. Discuss psychometric hiring approaches, which they offer as largely contracted out to third party consultants.
Cron and DeCarlo (2009)	Describe how Federated Insurance attempts to match candidates to the personality profiles of their most successful sales representatives. Consider specific personality traits like optimism, extraversion, and sales adaptiveness and their relation to sales performance. Discuss personality tests like the Edwards Personal Preference Schedule. Firms could choose traits that are significant for the particular sales position.
Ingram et al. (2012)	Discuss creation of a profile of best salespeople as well as specific traits, such as listening, which are firm specific. Discuss how a sales candidate's external activities such as involvement in sports, music, or business clubs can serve as a proxy for other internal psychological dimensions that likewise predict sales performance within specific organizations. Describe general personality traits that predict sales performance. Make suggestions for improved use of tests. Offer several tests including Craft System's Craft Personality Questionnaire, Sales Success Profile, StrengthsFinder Test, and Profile Sales Indicator as some tools for assessing potential sales candidates.

## PROJECT INNOVATION

### *Information Provided to the Students*

The assessment project is embedded within a course that adopts a traditional textbook and Nancy Martini's (2012) *Scientific Selling: Creating High Performance Sales Teams through Applied Psychology and Testing*. Martini's book serves to exemplify behavioral

assessment by means of the approach taken by a dominant player within the assessment industry, PI Worldwide. Specific parts of the project are designated so that students explore the development and application of behavioral assessment with respect to the hiring process. Specifically, the project covers the gamut of job identification (i.e., creating a sales hiring ad) through corrective measures post hire (i.e.,

coaching) (Figure 1). We ask the reader to review perspective on the project. Figure 1 before continuing so as to gain the students'

Section #1: <i>Competitive Analysis</i>	Identify a company that uses personal selling, real or imagined, then: (1) Explain what the company does (its industry, its products and/or services, how it uses a sales force(s), other company-specific issues, etc...); (2) Outline the competitive landscape for this company. Conduct a strategic analysis that examines both internal and external factors (e.g., SWOT). This analysis should reflect not only on the corporation's overall strategy, but also how that strategy relates to the organizational level(s) within which the sales function is housed. This analysis should also account for how the sales function achieves SBU and corporate-level objectives.
<b>Notes:</b>	If choosing an existing company, provide references related to that organization. When important information is not publicly available, deduce likely information by reference to supporting literature. If an imaginary organization is chosen, envision the organizational details as you see fit, but should be logically justified by reference to the extant literature. This will often require more references.
Section #2: <i>Behavioral Assessment</i>	Translate Section #1 into a behavioral assessment for your sales team. You will need to identify critical behavioral success factors for the sales position. Suitability of factors should be determined <b>and</b> demonstrated by reference to the behavioral sciences literature. Afterwards, identify key behavioral scales/measures from the behavioral sciences literature (e.g., sales/marketing and psychology) for use in the behavioral assessment.
Section #3: <i>Hire a Rep</i>	Sketch a "scientific hiring" program for your sales team (See pp. 56-66 of Martini, 2012). When discussing the behavioral assessment, further reference template candidates as Martini does with Candidates A, B, and C. You might find it useful to treat this project as an actual hiring situation rather than as explicitly hypothetical. Construct template questions and candidate answers for your strategic interview(s). Answer who you would hire and why. (Five sub-steps in this section are outlined on p. 5.)
<b>Notes:</b>	"Step 1: Analyze the Job" will rely on research uncovered during Sections.#1 and #2. An important distinction is in how that information is presented. An interview guide is provided on e.g., p. 149 of Ingram et al. (2012) for "intensive interviews". Please note that main textbook's approach differs from Martini's (2012). Use caution when translating from intensive interviews to strategic interviews.
Section #4: <i>Coaching</i>	Imagine that the candidates you hired in Section #3 are transitioning from newbies to key players on your sales team. Assume you have assessment knowledge of their sales skills. Discuss hypothetical sales coaching scenarios for enhancing the performance of your transitioned candidates. How would you go about doing this? In what ways would you consider what <i>tends to motivate</i> them?
Section#5 <i>Letter</i>	Include a letter to me with your submission. In that letter, outline the contents of your submission. Answer the following questions: Did you examine a real or imaginary company? Did you attempt any of the advanced options? If so, which ones? Did you compare and contrast Martini's (2012) approaches with those of the main textbook? If so, how and why?

Figure 1. Basic version of project handout. (Full version with advanced options and elaborate notes available upon request.)

**Learning Objectives and the Process Involved to Achieve Them**

Intended learning objectives are meant to (a) yield knowledge application of real-world scenarios, (b) increase knowledge of behavioral assessment and course involvement, (c) enhance confidence and skills in recruiting sales employees, and (d) advance job search process skills (Figure 1, sections 1-5, respectively). The project achieves the learning objectives through four main sections: competitive analysis, formation of a behavioral assessment, hiring

a sales representative, and coaching. Several optional asides of the project also exist such as making use of a sophisticated competitive analysis for section one (most students construct a SWOT), developing a sales skills assessment in addition to a behavioral assessment, and collecting actual data from peers and employing statistical measures such as coefficient alpha (available as a modified version of Figure 1 by request from the authors). An optional section of the project is left open whereby more advanced students consider an additional aspect of the sales hiring

process. Faculty are encouraged to allow students to reflect on what is additionally covered in their courses for the optional section. In our courses, students have especially been interested in addressing sales training. Finally, students compose a letter to the instructor whereby they answer a series of questions to guarantee critical reflectivity (refer to Figure 1, section #5 for details).

The project is typically completed in groups of 3-4 students. They work on the project through the course of the semester (16 weeks). Supplementary parts are generally given greater heft when elected and help to determine final scores or are used for allowances for weaker compulsory sections.

### ***Detailed Project Outline and Supporting Materials***

The first section of the project is relatively straightforward. Students identify a company that uses personal selling, which could be real or imagined, and explain what the company does (e.g., its industry, its products and/or services, how it uses a sales force(s)) while further outlining the company's competitive landscape. Importantly, the analysis is meant to reflect on the corporation's overall strategy, and also how that strategy relates to the organizational level(s) within which the sales function is housed. This analysis further requires students to account for how the sales function achieves SBU and corporate-level objectives. When important information is unavailable, students deduce current situations with reference to extant literature.

The second section of the project belies its innovativeness. Here, students translate the competitive analysis into a behavioral assessment for a sales team. Students identify critical behavioral success factors for the sales position determined by reference to the behavioral sciences literature (e.g., sales/marketing and psychology). Afterwards, students identify fundamental behavioral scales/measures for use in a behavioral assessment. By the time students approach section two, the instructor will have introduced literature on behavioral assessment underscoring the basic relationship between behavioral fit and a firm's corporate culture and strategies. In addition, students will have been familiarized with a multitude of examples from Martini (2012). New instructors can easily identify related literature from major textbooks discussed in Table 1.

In section three, students sketch a "scientific hiring" program for the sales team. This project aspect derives directly from Martini (2012, pp. 55-66). A first step tasks students with developing a *job description* to include reporting structure, key performance indicators, and experience and education requirements. In a second step, students design a *recruitment ad* that focuses on the sales environment, not the person. When ads describe the environment, "the potential candidate will visualize working in the environment and find the notion of working there comfortable or uncomfortable" (Martini, 2012, p. 59), and are thus considered superior. In contrast, Martini argues that ads that describe the person will lead to

applications from a deluge of inappropriate candidates. Step three tasks students with identifying a process for filtering resumes. In step four, students describe and compose questions for a telephone interview process. At step five, students describe the process of administering the behavioral assessment they created in section two. When discussing the behavioral assessment, students are strongly encouraged to reference template candidates ranging from those with a strong fit, to a fit in some respects, and finally to a poor fit. Lastly, students construct template questions and corresponding answers from hypothetical candidates for a strategic interview(s) of the best fit and fit in some respects candidates. At the end of the exercise, students indicate their willingness to hire any of the candidates.

The final substantive section, section four of the project, involves a coaching scenario. For the hypothetical candidates hired in the previous section, students are asked to envision that these candidates are transitioning from newbies to key players on the sales team. Broadly speaking, students assume knowledge of the representatives' sales skills and behavioral profile, which they use to construct hypothetical sales coaching scenarios. The goal is to enhance the performance of the now transitioned candidates and to motivate them.

## **ASSESSMENT OF THE EFFECTIVENESS OF THE PROJECT**

### ***Methods***

Thirty students who worked the specified sales project were invited to participate in an online survey hosted on Qualtrics. Twenty-eight students ranging in age from 18-25 participated in the survey with gender split equally, and were entered into a drawing for six \$10 gift cards. Students were instructed to respond to questions evaluating the sales project's usefulness for their academic and career progress. The first few questions in the survey evaluated a student's application of learning, measuring learning objective (a), from the sales project via two hiring ads (from Martini, 2012): one emphasizing the sales environment and the other personal traits. This was followed by two questions on the ad ("Please rate the effectiveness of the ad" and "How likely are you to use this ad if you had to hire an employee?") for each. Next, continuing to measure learning objective (a), students read a short script from a recent Wall Street Journal article on personality tests in hiring (Weber, 2015; see Table 2). The article entailed assessment history only, and students' impressions should therefore be formed solely on the basis of their own backgrounds. This was followed by three questions: "I believe that the right way to hire salespeople is through behavioral personality tests," "Personality tests can help hire salespeople who will be a right fit for the job profile," and "Personality tests can be better predictors of hiring sales employees than auditioning a candidate for a sales call." Responses were anchored on 5-point

Likert-type scales ranging from *Strongly Disagree* to *Strongly Agree* ( $\alpha = .68$ ).

The application questions were followed by questions evaluating the project's effectiveness in student learning, which measured the remaining learning objectives, (b) ~ (d). Items were included for (b): perceived confidence of sales hiring (single item); knowledge of sales hiring and management (8

items,  $\alpha = .75$ ); for making assessments (c): traditional educational goals (4 items,  $\alpha = .77$ ), involvement in the course (single item); students' reactions to the project (4 items,  $\alpha = .75$ ), which we adopted from Rinaldo, Laverie, Tapp and Humphrey Jr. (2013); and (d): job search preparation (4 items,  $\alpha = .73$ ) (Table 3).

Table 2

*Application Assessment Stimuli*

<p><b>Wall Street Journal Script</b> A recently published WSJ article titled, "Today's Personality Tests Raise the Bar for Job Seekers," stated the following: "Personality tests were developed for the workplace in the 1940s and 1950s by research teams at industrial companies like AT&amp;T Inc. They were first used largely to screen candidates for management jobs. Employers wanted to know, for instance, if a potential executive was an extrovert, prone to anxiety or an office backstabber. They fell out of favor in the 1960s, after researchers questioned their reliability, only to resurface in the 1990s, when industrial psychologists determined they had value as a hiring tool."</p>
<p><b>Hiring Ad 1</b> "ABC Company would like to invite ambitious, hard-working individuals to apply for the position of full-time Sales. Applicants should be able to bring new ideas and improvements to business practices. They should remain fair, respectful, and moral in all situations, and work well both independently and as part of a team. Contact today for more information."</p>
<p><b>Hiring Ad 2</b> "We are looking for a few strong individuals for a full-time Sales position to join our fast-paced environment. This position gives you the ability to control your own destiny, have variety in your day, and be rewarded on your own results. Contact us today for more information."</p>

Table 3

*Assessment Items for Project Learning Constructs*

Assessment Construct	Assessment Items
Perceived assessment confidence	At the end of this class, I expect to feel confident about recruiting sales employees.
Career goals	Overall, the project work has helped me develop my career skills. The project work serves as a good surrogate for real world experience.
Job-search preparation	I plan to include the skills and knowledge gained from the class project on my resume. I plan to discuss the skills and knowledge gained from the class project during job interviews. I don't think knowledge of how to hire a salesperson will help me get a job. (R) I don't think knowing how to hire a salesperson will be something I will need to know when I have a job. (R)
Knowledge of sales hiring and management	Knowledge of hiring sales employees will help me critically evaluate sales employees' behaviors. Knowledge of hiring sales employees will help me understand the interactions between cognition, affect, and behavior. Knowledge of hiring sales employees will help predict market conditions that contribute to hiring decisions. Knowledge of hiring sales employees will help explain how sales interacts with cultural norms. Knowledge of hiring sales employees will help assess ethical implications of sales jobs. Knowledge of hiring sales employees will help identify how salespeople target consumers. Knowledge of hiring sales employees will help understand how services segment in a global economy. Knowledge of hiring sales employees will help identify where shortcomings may occur in a selling situation.
Involvement	The sales project increased my involvement with the course.
Satisfaction	The sales project contributed to my overall satisfaction with the course.

Student (positive) reactions	<p>I think the integration of the project into the course material has made this class more enjoyable.</p> <p>I would recommend that the instructor use the same project again in the course again next semester.</p> <p>I believe the use of the project has done nothing to enhance the understanding I gained from this course. (R)</p> <p>Overall, I would rate the use of the sales project in class very highly.</p>
Traditional learning goals	<p>The project was useful in learning concepts of hiring a sales employee.</p> <p>I learned a lot from this project.</p> <p>I learned more in this class than other classes because of the project.</p> <p>The project helped me to perform better on the exams.</p>

**Assessment Results- Knowledge Application**

Students' responses to the ads were compared using a paired samples *t*-test. As expected, students rated the second ad that emphasized the sales environment ( $M = 2.96$ ) as significantly more effective than the ad emphasizing person traits ( $M = 2.39$ ) ( $t(27) = -2.40, p < .05$ ). Similarly, students were partially significantly more likely to choose the second ad ( $M = 3.14$ ) over the first ad ( $M = 2.54$ ) ( $t(27) = -1.99, p < .10$ ). Finally, students scored significantly higher than the mid-point value of 3.0 ( $M = 4.01$ ) ( $t(27) = -1.99, p < .10$ ) indicating greater preference for ads emphasizing the sales environment.

**Assessment Results-Sales Project Effectiveness in Learning**

One sample *t*-tests comparing the means to the midpoint value (3.0) were conducted to test students' responses to questions evaluating the effectiveness of the sales project in furthering their education. Students found the sales project to significantly improve their perceived confidence in sales hiring ( $M = 3.96$ ) ( $t(27) = 11.90, p < .00$ ) and job search preparation ( $M = 3.79$ ) ( $t(27) = 6.15, p < .00$ ). Further, the project significantly helped achieve knowledge of sales hiring and management ( $M = 3.88$ ) ( $t(27) = 11.54, p < .00$ ) and traditional learning goals ( $M = 3.33$ ) ( $t(27) = 3.03, p < .01$ ). Finally, students felt significantly more involved in class by working on the class project ( $M = 3.57$ ) ( $t(27) = 3.29, p < .01$ ) and had significantly more positive reactions to using the project to learn class material ( $M = 3.37$ ) ( $t(27) = 2.72, p < .01$ ).

**SOLVING THE IDENTIFIED PROBLEMS WITH THE PROJECT**

Overall, the sales project was effective in preparing students for academic success as well as success in job market search and behavioral assessment skills. Evidence for solving problem 1 related to understanding testing and realizing its importance is demonstrated in students' responses to desired learning outcomes. These items capture what sales managers need to know with respect to the complex interactions between behavioral factors, targeting customers, and diagnosing shortcomings in a selling situation among others. Further evidence is provided in students' higher ratings of the job ad descriptive of the environment versus person. The project provides a platform for students to construct and hypothetically

implement a behavioral assessment in a hiring situation of their choosing. In doing so, the project overcomes problem 2, a lack of introduction to behavioral assessments in our current sales and marketing education. As a result, students indicate greater confidence with respect to their abilities to recruit sales employees. While fostering critically reflective thinking, this approach allows marketing educators to circumvent the need to acquire costly proprietary tools as course materials. Finally, the project satisfies problem 3 in that students indicate it is a good surrogate for real-world experience and has helped them to develop career skills. Thus, it is unsurprising that students indicate the project experience will factor into their job-search preparations.

**POTENTIAL CHALLENGES AND CORRESPONDING SOLUTION**

Two broad concerns include students' level of preparedness and their reliance on linear thinking. Although not a prerequisite as implemented by the authors, a previous course in behavioral sciences (e.g., consumer behavior) and/or marketing research is desirable. Another issue is that some students might find the nonlinear aspect of the project stressful. In part, this is by design given the project's embrace of cognitive flexibility theory. In our experience with this project, we have found that reminding the students that there is a learning curve has proven to reduce their concerns. Because student groups' selection of scales/constructs is idiosyncratic, students' questions that regularly arise offer opportunities for instructors to scaffold in cognitively flexible ways. Discussed previously, an instructor might introduce measurement issues related to domain specificity by asking a group to consider whether a measure more directly related to emotional intelligence in sales situations would be a better predictor of sales success than general emotional intelligence. The instructor would then, following cognitive flexibility theory, attempt to get other students thinking of how the lesson relates to the specific constructs they have chosen to focus on. In addition, we intermittently require students to post submissions related to the project and provide feedback to encourage depth of thinking on assessment issues. Specifically, we ask students to compare and contrast markedly different sales forces and to conjecture on hiring assessments for them,

which has proven invaluable to stimulate deep critical thought. Moreover, we find it worthwhile to ask students to consider the actual wording of similar behavioral measures with respect to the job requirements of the sales representative within a particular organization – e.g. Selling Orientation-Customer Orientation (Saxe & Weitz, 1982) vs. Market Orientation (Narver & Slater, 1990). Already noted, students generally possess only a very basic understanding of measurement theory if any at all. Therefore, providing ongoing examples of behavioral assessments that become further refined as the semester progresses is the single most crucial element of the scaffolding process for the project.

### **ADAPTING THE PROJECT TO OTHER SALES COURSES**

Besides sales management, this project has general appeal in personal selling courses if greater emphasis

is placed on the role of the sales person. By employing statistical methods and real or hypothetical data for the assessments, this project might be suited to courses that consider data-driven approaches to sales such as sales technology courses. Instructors at smaller universities where multiple course preps is the norm, might look to this project to find ways to bridge across courses. For example, if additionally instructing on international advertising, an instructor might ask her or his students to revisit the project from an international perspective in which the cultural lens renders the same assessment constructs for a particular company less relevant. Finally, this project addresses topics that overlap with courses in human resources and other management courses. Universities that are constrained with respect to their abilities to offer a diverse array of majors or electives may find it desirable to offer this project as an alternative assignment to those students interested in sales careers.

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