

Analyzing the Impact of a Sales Shadowing Program: Process and Outcomes

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Purpose of the Study: Experiential learning opportunities, such as the chance to shadow a professional, can be an excellent tool allowing students to observe first-hand the material presented in the classroom. However, while shadowing projects are assumed to be beneficial to sales classes, empirical research presenting the benefits is limited. This paper describes the process of administering a sales shadowing project, reports findings on the benefits of such endeavors, and offers quantitative and qualitative data on project impact.

Method & Sample: Across five semesters, 131 sales students participated in a sales shadowing program. Information on the industries shadowed, responses from students and sales managers, as well as eventual outcomes for the students, companies and the University Sales Center were recorded.

Results: Students shadowed businesses within 55 distinct industries, as categorized by the 6-digit NAICS coding system (North American Industry Classification System). Over half of participating students received job interviews from the company they shadowed, with over 75% of those students receiving job offers and other professional opportunities as a direct result of the shadowing program. Additional outcomes reported include benefits to the Marketing Department's Sales Center in the form of financial sponsorship, corporate student scholarships, and professional development workshops.

Value to Marketing Educators: Findings are reported with long-term benefits to students, participating companies and University Sales Centers. In this way, the project addresses all stakeholders in the sales education and recruitment process.

Keywords: Shadowing, Sales Management, Experiential Learning, Sales Center

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Experiential Learning: What's The Impact?
In his article on training through behavioral modeling, Jones (1981) put it succinctly; "If a picture is worth a thousand words, a demonstration by a model is probably worth several thousand." The introduction of modeling into higher education has led to the rapid incorporation of terminology such as 'action learning' and 'experiential learning' (Whetten, 2007). Educational research has likewise shown an increased focus on opportunities that more holistically engage students in the learning process (Kolb, 1984; Van der Schee, 2007). Business schools have long sought to introduce concrete learning opportunities and realism into the classroom due to the practical nature of the discipline itself. Case studies, role-plays, simulations, field projects, internships and team learning are some of the activities traditionally utilized (Gentry, 1990; Loe & Inks, 2014). While students seem to see relevance in their classroom material when they have experienced topics first hand, findings are limited in reporting the explicit benefits of these experiential learning opportunities.

Experiential Learning in the Sales Classroom
Efforts to enhance the university sales curriculum has increasingly turned towards student-centered approaches to learning, not just as a response to the desires of the current student cohort for hands-on experience, but also as a response to the needs and interests of the business community (Lamont & Friedman, 1997). With the high cost of training and turnover in sales (Adidam, 2006), companies are acutely aware of the value in both high-quality sales education and the ongoing recruitment relationships that can be fostered with Universities. As an applied discipline, professional sales curriculum is a clear fit for experiential learning projects. Recent publications on active sales course components have explored simulations, role-plays (Bobot, 2010; Serviere-Munoz, 2010), and even projects in which students sell an actual product (Inks, Schetzlsle & Avila, 2011). Shadowing, a form of in depth interaction and observation, is unique in that it occurs outside of the classroom, and therefore enhances career readiness in a distinctly unique way (Shermont & Murphy, 2006). Shadowing a sales professional allows the student to engage with a one-on-one experiential learning experience while simultaneously connecting with

insights from the larger course in which the student is enrolled. This paper describes a variation on a classic shadowing opportunity for students within a University sales program, but it also provides some much-needed data to support the value of this endeavor.

The SWASM Project

The SWASM project was adapted from a sales force shadowing program originally intended for students in an agricultural sales course, which was created and popularized by agricultural economics professors at Purdue University (Leach & Downey, 1999). Over the course of the semester, students select, contact, correspond with, and shadow a sales professional while completing several written assignments along the way. A quick Internet search of 'Sashay with a Salesperson' (or SWAS) reveals that many instructors have adapted this particular project for shadowing sales people in other areas, but none to the authors' knowledge have ever adapted the activity for shadowing sales managers. With this simple alteration we propose 'Sashay with a Sales Manager' (SWASM).

SWASM and Stakeholder Impact

There are several reasons for implementing this alteration. Firstly, managers may have a broader set of experiences to draw from and can therefore offer deeper insights into the field. Additionally, sales managers provide a stronger point of contact for networking in the student's area of interest than the sales force and may also more directly impact outcomes for recruitment and Sales Center involvement. Further, in adapting this project from its original form (SWAS) to focus on sales managers, 'Sashay with a Sales Manager' prevents students from selecting sales people of limited experience in the field (recent graduates, newly hired sales recruits). This manuscript explores how shadowing a sales manager may offer a great benefit to students, and to firms interested in recruiting graduates. The students and shadowed managers reported a highly positive experience from the interaction, and as an added benefit, the University's Sales Center built new leads for corporate partnerships. In this way, the project addresses all stakeholders in the sales education and recruitment process (Agnihotri, Bonney, Dixon, Erffmeyer, Pullins, Sojka & West, 2014).

Goals of the SWASM Project

In formulating the goals of implementing a shadowing opportunity, we first looked to our students. The majority of students enrolled in the Advanced Sales classes have an emphasis in Sales and Sales Management, and have a genuine interest in a sales career upon graduation. Therefore, a primary goal of SWASM has been to aid these students in better understanding the sales field. However, there are typically a smaller number of students not working towards a sales emphasis within these courses, therefore, developing an experience that could be embraced by students of all majors was important. Beyond educational outcomes, additional goals of this

project included giving managers an opportunity to meet with students in an informal way to pique interest in hiring our graduates, and providing the University's Sales Center with more outreach and collaborative opportunities.

METHODOLOGY

Over five academic semesters between 2012 through 2015, 131 students at the junior to senior level (63 female, 68 male) enrolled in an advanced sales course at a Southeastern University were each asked to locate, contact, interview and shadow (for at least one day) a sales manager. It was recommended that the sales manager chosen should be in the industry the student finds most interesting and that the student hopes to be employed in upon graduation, and could be in either 'inside' or 'outside' sales. With this flexibility, those students who were not a part of the Sales Emphasis program could still opt to work within their field of interest (for example, a Logistics student might select a Manager in Logistical Sales). Students were on their own to find these managers and encouraged to cold call companies they might find interesting. Students were given instructions to plan a meeting with a sales manager who would be willing to participate. Sales managers were encouraged to make a sales call on the day of the shadow if possible, or discuss the sales method(s) employed within the company. Kolb's (1984) learning cycle would suggest that in order to foster deeper knowledge, curriculum should include a reflective observation as well as a concrete experience. Therefore, students were to journal during the meeting and while observing the sales manager's activities, culminating in a reflective essay on one call or activity that the student found most interesting. Beyond this, the process was left intentionally open to allow for autonomy within the project, while keeping within the context of several core assignments.

SWASM Student Assignments

The SWASM project contains seven individual steps or written assignments adapted from SWAS, with directions provided to students for completion (see Table 1, which includes learning outcomes based on Bloom's (1956) Taxonomy). Each assignment was accompanied by a class lecture to provide depth and context. In the first assignment, students develop leads on prospective individuals to shadow, and the instructor reviews and approves the student's final choice. Next, the prospect is contacted in an appropriate business format setting up the encounter, and all formal communications with the manager are submitted as the second assignment. Students confirm their shadowing arrangement with the sales manager in block letter format as the third assignment and notify the professor when the shadow has been completed through a contact report, which serves as the fourth assignment. Students write up an in-depth evaluation of the shadow experience in a five-page paper as the fifth assignment. Students create proper thank-you

notes to the participating sales managers as the sixth assignment. Finally, the students request that the sales manager submit an overall evaluation of the student's participation directly to the instructor as the seventh assignment. Sales managers are encouraged to offer advice or any anecdotes on the student's

professional presence during the shadow. An additional eighth assignment, depending on the amount of time left in the semester, can include a classroom discussion/presentation by students on the experiences each had with their sales manager.

Table 1. SWASM Assignments*

SWASM ASSIGNMENT	Summary of assignment goal	Learning Outcomes
1. Sales Manager Prospecting	Student provides the name, contact information, company, and industry of two potential shadow leads. Student explains why this individual industry was chosen. Instructor may provide guidance.	Student will be able to prospect, select, prepare, and plan a sales call.
2. Contact Report	Student confirms who, date, time, and place for shadowing sales manager.	Student will demonstrate evidence of completed research and successful application of planning a sales call.
3. Confirmation of Appointment	Student constructs a formal business letter in block format to the sales manager, confirming the appointment.	Student will apply business communication skills by constructing a letter to the sales manager.
4. Completion Report	Student confirms that their assigned meeting has been completed.	This assignment simply ensures that students are on schedule, and can coincide with a time management discussion.
5. Written Report	Student completes a 5-page report on one call/activity of interest from the shadow, to include a cover page, one page of background summary, 3-4 pages of customer relation observations, comparing and contrasting classroom sales studies, and a one half page critique of the sales manager.	Student will critique and reflect on the sales meeting. Student will apply concepts and skills taught in classroom to observations from a real-world experience.
6. Follow-up	Student creates a personalized follow up contact to express appreciation to their sales manager.	This assignment supports discussions on professionalism, relationship management and follow-up, and can coincide with a CRM discussion.
7. Manager Evaluation of Student	Student forwards an evaluation form (provided by the instructor) to the shadowed sales manager and request that it be returned to the instructor directly.	Student will be able to receive constructive criticism on their performance outside of the classroom instructor. The evaluation provides feedback from the manager's perspective on the interaction, and also asks for the manager's interest in future shadowing projects.

*For full set of assignment worksheets and grading rubric, please visit <http://BIT.LY/1XJowSz> (minding letter case)

A time table is set up for each of the assignments but flexibility is necessary in several of the assignments based on the arrangements between the student and the sales manager. SWASM assignments 1 - 3 are set in the first few weeks of the semester, while SWASM 4 - 7 may depend on the timeframe determined by the student and sales manager.

Data Collection

Those who completed the project were surveyed on their career prospects in association with the SWASM project at the end of the academic year during which the student was registered for the Advanced Sales course. Questions reconfirmed the company for which

they shadowed, and also asked whether the student received an internship, interview or job offer from the company they shadowed. Finally, students were asked whether they had accepted any of these offers. As the advanced sales courses primarily serve senior-level students, this process adequately covered the outcomes of most participating students.

RESULTS

Impact on Early Career Outcomes

Students shadowed companies within 55 distinct industries, as categorized by the NAICS 6-digit coding system (North American Industry Classification

System). The most commonly shadowed fields included professional services (3PL logistic companies, marketing firms, payroll and staffing providers); wholesalers (providers of construction materials and medical equipment); followed by manufacturing (such as textiles and food manufacturers), retailers (auto parts, retailers, and custom clothiers) and finance/insurance (insurance,

banking and loan services). The large proportion of projects focused on professional services is likely an artifact of the major and minor programs in which these students tend to be associated, as the University has a large Logistics and IT contingency in which the Advanced Sales course is encouraged.

Table 2. SWASM Industries and Student Career Outcomes

NCAIS Industry Categories	Sample Sub-categories	# SWASM Projects	# Resulting Interviews	# Job Offers / Offers Taken	# Resulting Internships
Utilities	Power Companies	2	1	0 / 0	1
Manufacturing	Textiles, miscellaneous food, spices & extracts	18	9	5 / 4	0
Wholesale	Construction materials, medical equipment	20	11	10 / 8	0
Retail	Auto parts, clothiers, cosmetics	16	9	7 / 3	2
Transportation	Passenger air transportation, delivery	3	2	1 / 1	0
Information	Publishing, data processing, telecommunications	4	0	0 / 0	1
Finance & Insurance	Banking, loans, credit unions, insurance agencies	15	7	6 / 3	1
Real Estate	Real estate agents, property management	6	3	2 / 2	0
Professional Services	3PL, marketing, PR, payroll, staffing	33	19	15 / 11	4
Administrative Services	Waste management, business support services	2	2	2 / 1	0
Educational Services	Universities, Colleges	1	1	1 / 1	0
Recreation & Entertainment	Racetracks, event promoters	2	2	1 / 1	0
Accommodation & Food Services	Hotels, full and limited service restaurants	5	1	1 / 0	0
Other Services	Civic and social organizations	3	0	0 / 0	1
Public Administration	National security	1	0	0 / 0	0
	TOTALS	131	67	51 / 35	10

As realistic opportunities for exposure to sales as a career are positively linked to eventual interest in the sales profession (Allen, Kumar, Tarasi and Wilson, 2014), the student response was imperative. Student reports suggested an overwhelming appreciation for the project, as ideas from the shadowing experience gave relevance to classroom topics and brought about lively discussions. Content analysis was conducted on the textual data from student reports of their shadowing experience (Assignment 5) to search for substantive themes. Cohen's kappa for inter-rater agreement between two independent judges was at .83. Prevailing themes along with sample comments

are shown in table 3, with Bloom's (1956) Taxonomy applied in the framing of these themes and the associated levels of critical thinking.

Evaluations provided by the sales managers suggest that they also enjoyed face-to-face meetings with the sales students. In manager evaluations (Assignment 7), all managers agreed that they would consider hiring our students if a position were available, and 80% agreed that they would like to be contacted to participate in future shadowing projects. A small sample of sales manager comments can be seen in table 4 below.

Table 3. Content Analysis: Key Themes within Student Reports

Theme & (Occurrence) ¹	Outcome Level
Student recognizes the importance of relationship building (56%) <ul style="list-style-type: none"> • I caught on to the fact that he was still building rapport in the meeting, even with an existing customer. • She is there to do her job, but she is all about putting the client's needs first and making sure they're comfortable. • What I took away was that building relationships and rapport was sometimes more important than making the actual sale. 	Knowledge
Student discovers and interprets a useful sales tactic (54%) <ul style="list-style-type: none"> • When he was making certain points in his sales pitch that were key points, he would change the tone of his voice so that certain words would stand out to the buyer. • The first thing I noticed is how much time he spent speaking with the secretary, who is the office's gatekeeper. By forming a friendly relationship with her, he basically has an open door to the decision maker. • While we were still in his office, he pointed out that in his mind the sales meeting had already begun. He pulled out a folder and told me he wanted to know and understand everything about the client before walking into the meeting. 	Application
Student develops a better understanding of the realities of a sales career (47%) <ul style="list-style-type: none"> • The most eye opening was watching the sales call. We talk about it in class but actually seeing one in person was the best learning experience. • The project helped me identify what sorts of sales situations I might eventually be in within my industry of interest. • From this project I got to learn what a typical day in the life of a salesperson looks like, and I realized that I might be good at this. 	Synthesis
Student identifies the importance of initiative-taking or goal-setting (40%) <ul style="list-style-type: none"> • He sets a goal for the day to make the money he wants to earn. • She said that if there's one thing she learned from her job, it is that you cannot wait around for the customer, you have to initiate the close and not be too scared to ask for the sale. • I saw the amount of research that was needed for each client in order to compile a personalized presentation and get the sale. 	Knowledge

Note: ¹Indicates the percentage of reports within which the theme was present

Table 4. Sample Comments from Sales Managers

Comments
This student is a born salesperson! I wish I had 100 sales people with this kind of enthusiasm. This is a great idea!! Please call on me next semester. Can I help you any other ways? Student was very professional – it is inspiring considering all the things you see on TV about kids this age. Thank you for introducing us to our newest hire! Student asked for an internship – we are doing it!! We have our potential new hires shadow, but shadowing while in school – a great idea.

Of the 131 participating students within the five semesters in which SWASM was assigned, 67 (or 51% of those who participated) were offered job interviews by the company they shadowed, and 51 of these 67 students received job offers (See table 2). Only 16 declined positions for other opportunities. Other outcomes included ten students receiving internships from the company shadowed (as those students were not yet on the job market) and five students who reported the realization that they were not truly interested in the particular industry chosen for the shadow. Two students reported that the contact

made through SWASM directly led to an opportunity with another company via professional networking. The project also resulted in continued relationships between several of the participating companies and the University. Nine companies participating in SWASM have since requested additional interaction with the Marketing Department's Sales Center, by providing financial sponsorship, offering student scholarships, and a variety of professional development workshops for sales classes, as well as critiques for the student competition team in preparation for national sales competitions.

DISCUSSION

Impact for Students, Employers and Centers

The biggest take away from the SWASM project was the sheer number of interviews and job offers that resulted from the project, as well as generous donations of time and (later) funding to the University sales program when managers were the focus of the shadow. Furthermore, students were provided the opportunity to observe the industry they were most interested in before attempting to interview. Overall, each manager spent a sizeable amount of time with the individual sales student and the value of this experience was not lost on the students.

While local companies were primarily tapped for the project, several students requested to shadow companies in other nearby large cities, which suggests that the impact of this project over time is regional in scope. The SWASM project can therefore be a powerful networking tool for University's Sales Centers, as students brought new contacts to the school that otherwise might be overlooked. The interactive nature of SWASM also allowed potential employers of our future graduates to vet possible hires, or at the very least to form a strong impression of the quality of graduate our University produces for future hiring efforts. The positive feedback from managers wanting to help with this project was overwhelming, and the students were instrumental as a touch point with the business community.

Potential Adaptations of SWASM

This paper also describes a shadowing activity that might be easy to adapt for any sales or marketing class. For example, a course in retailing may do well implementing a retail management shadow (likewise there could be benefit brought to a Retail Center), or a course in logistics could create a similar shadowing opportunity with local logistics and distribution managers. In any such adaptation, tracking and assessing impact should be encouraged.

Challenges of Implementing a Shadowing Project in an Advanced Sales Class

Limitations observed by the instructors must be noted. Initially, undergraduates may be reticent to go out into the world and contact strangers. However, overcoming this discomfort can be considered an important learning outcome associated with the 'cold-call' nature

of the prospecting assignment. After several semesters of implementation, word-of-mouth has spread and students taking this class now seem to recognize of the value of SWASM even before the project begins. Students in the most recent semesters seem acutely aware of the number of students who had found their first jobs from this project. There may be some students who insist that they cannot imagine how to find someone to shadow. Talking to this student about the importance of networking, the practice of prospecting for leads, and the experience of cold calling, is an opportunity that may be taken when students feel there is no one to shadow.

Another challenge may be the availability of the sales manager. Students need to be reminded that professionals have their own schedule, and this may not follow the class' schedule. As stated before, the deadlines for assignments, especially those at the end of the project, must be flexible based on the needs of the sales manager. Starting early in the semester on the project is recommended, as this gives everyone an opportunity to effectively schedule the shadow meeting and to contact another source, if necessary. Students need to prepare for changes or interruptions that may come with the SWASM, and it is a good idea for each student to have more than one lead on potential sales managers for the shadow. A manager may cancel or have to reschedule due to work related issues, and this has happened. The authors' have contact with several local sales managers to call on at the last minute if the need arrives, though rarely has this need arisen. The amount of time that must be devoted to overseeing a multi-step project and keeping everyone on track can be substantial, and therefore may not be practical for all courses.

In summary, sales manager shadowing in a sales class provides a unique educational opportunity. While challenges in implementing any experiential project may exist, the significant payoff for students, companies and Universities' Sales Centers is apparent. The collaboration gives students a deepening engagement in the course material and a first-hand experience in the world of sales. This is a distinctive and enjoyable project that gets students out of their comfort zone (or the classroom) and into real world. The SWASM project extends the existing model of shadowing a sales person towards shadowing a manager, and the results suggest benefits to all parties involved.

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