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Relational selling: Past, present and future☆

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ABSTRACT

Relational selling is at a crossroads: Some trends undermine salespeople's ability to build strong relationships (e-commerce, buying norms), but others emphasize the importance of such links (services, solutions). To anticipate the future of relational selling, this comprehensive review of research and practice seeks to clarify the impact of the changing conditions. Specifically, this study assesses relational selling from three perspectives. Perspective 1 is a temporal lens that reflects the evolution of relational selling, to delineate how it has changed over time. Perspective 2, a theoretical lens, then encompasses the key theories that provide a theoretical underpinning of relational selling and that can be refocused on emerging conditions to understand its future effectiveness. Finally, with an empirical lens in Perspective 3, this study identifies which relationship strategies are most effective and in what conditions. By combining these perspectives, this article derives six key tenets to guide managerial practice and research in relational selling.

1. Introduction

Relationship selling is at the forefront of marketing practice and research (Palmatier, Houston, Dant, & Grewal, 2013), especially as new challenges—such as the rapid development of new technologies, growing expectations from buyers, and more administrative activities—hinder opportunities for relationship building (Dixon, Frewer, & Kent, 2011). As e-commerce has expanded, both business-to-business (B2B) and consumer transactions increasingly take place on digital platforms; by 2020, an estimated 85% of customer transactions will not require any salesperson involvement, implying a 33% potential reduction in the sales force (Baumgartner, Hatami, & Valdivieso, 2016). Yet B2B customers also confront increasingly complex service and solution offerings, which make trust and personal relationships critical (Nink, 2013; Viio & Grönroos, 2014) and assign more strategic relationship management responsibilities to sales forces (Paesbrugghe, Rangarajan, Sharma, Syam, & Jha, 2017; Sheth, Sharma, & Iyer, 2009). In this sense, relational selling is at a crossroads, such that some trends undermine strong, face-to-face relationships, but other trends demand such interactions.

In response, this study seeks to provide insights into the future of relational selling by undertaking a comprehensive review of research and practice that can reveal the impact of changing conditions, on the basis of three critical perspectives. By describing the *evolution of relational selling* from the 1970s to the present, Perspective 1 provides an important historical lens that reveals how relational selling has changed over time and thereby predicts how emerging changes may affect its future. In addition, this approach presents a multidimensional view of relational selling and provides insights to guide future research and practice. We also analyze *key theories* in Perspective 2, using these fundamental building blocks to assess current conditions and anticipate the future effectiveness of relational selling. Perspective 3 reveals key *empirical insights* from relational selling literature that indicate the most effective relational selling strategies, mediators, and moderators. With this approach, this study contributes to extant literature in four main ways. First, with Perspective 1, we identify four key approaches over the evolution of relational selling:

(1) *Individual selling*. The early roots of relational selling featured a traditional, one-to-one sales process, with a strong emphasis on the salesperson's efforts (Borg & Young, 2014). Subsequently, it expanded to include both the salesperson's and the buyer's perspectives.
(2) *Buying center*. Buyer–seller exchanges soon emerged not as discrete events but as ongoing relationships. As a result of global competition, buyers and sellers increasingly engage in collaborative efforts

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to reduce costs while maintaining quality.
(3) *Adaptive selling.* This model of personal selling focuses on identifying customer's needs and wants.
(4) *Customer orientation and solution selling.* In line with the shift to a service economy and increased focus on customers, the role of the salesperson has evolved from partner to value creator.

Understanding how such trends have altered relational selling suggests likely changes in the future. That is, we anticipate that B2B selling approaches will entail team efforts to maximize competitive advantages and develop, test, and apply new sales concepts and models. A frequency analysis of extant literature shows that team-based selling and solution selling approaches are likely to remain critical.

Second, we identify six *key theories* in Perspective 2 that underpin relational selling. The evolution of these theoretical mechanisms parallels the contextual trends; for example, the theoretical focus of relational selling research has moved from individual characteristics (e.g., seller, buyer) to dyadic and then to network perspectives, together with a shift from theories that suggest mutual dependence based on power and resources, to those that identify dependence based on trust and long-term commitment.

Third, Perspective 3 summarizes various *empirical insights* from prior relational selling literature. In settings marked by complex customers, changing environments, and technological advances, the seller's behavioral adaptations and team selling offer sufficient flexibility to cope with customers' demands. Cultural, social, and technological changes in business environments also imply the continued need for mutual trust and long-term commitment. Some relational selling strategies differ depending on the relational phase; efforts adopted at the wrong time can hinder the organization's bottom line. With this review, we seek to specify not only what has been investigated already but also the direction in which research is likely to move.

Fourth, by combining the temporal, theoretical, and empirical insights from these three perspectives, we identify six key tenets for effective relational selling:

(1) Increase the strategic role of inside sales organizations,
(2) Gain customer insights related to e-commerce, privacy, and the legal environment,
(3) Integrate relationship building across omnichannel interfaces,
(4) Understanding the influence of technological applications across relational contexts,
(5) Use big data for more effective relational selling, and
(6) Leverage artificial intelligence for relational selling.

2. Perspective 1: evolution of relational selling approaches

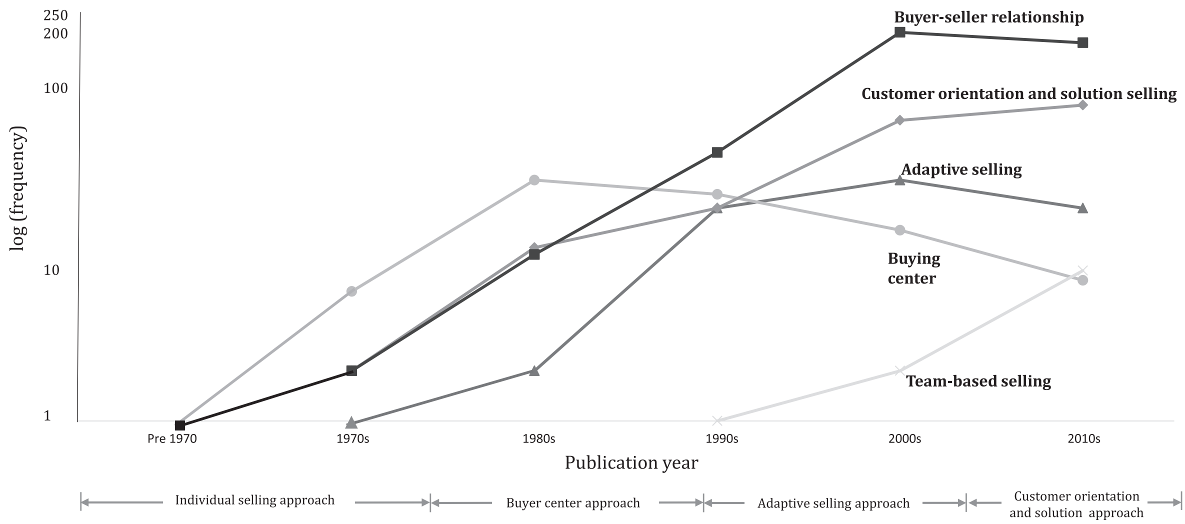
To explore the evolution of relational selling approaches over five decades, we combine a literature review and keyword frequency analysis within a historical lens. As noted in Section 1, we identify four major approaches: *individual selling*, *buying center*, *adaptive selling*, and *customer orientation and solution selling*. The evolution across these approaches, along with key theories, selling modes, trends, disruptions, and insights, are summarized in Table 1.

2.1. Individual selling approach

Relationship-oriented selling practices began in the pre-industrial era (Sheth & Parvatiyar, 1995). In the early part of the last century, sales resulted from product availability or proximity to natural resources (e.g., water). During the production era (1870–1930), salespeople paid little attention to buyers' needs and acted mainly as product suppliers (Powers, Koehler, & Martin, 1988), with the assumption that customers would buy whatever was produced (Bonoma, Bagozzi, & Zaltman, 1978). This traditional sales process relied on salespeople's efforts or aspects of their personality to find prospective

Table 1
Evolution of relational selling approach.

	Individual selling approach (early roots of relational selling)		Buying center approach	Adaptive selling approach	Customer orientation and solution selling approach	
	Pre-1970s	1970s	1980s	1990s	2000s	2010s
Theories	Exchange theory	Power and dependence theory	Social exchange theory	Commitment-trust relationship	Commitment-trust relationship; resource-based view	Commitment-trust relationship; resource-based view; network theories
Sales mode	One-to-one	Dyadic	One-to-one; dyadic; organizational	Organization-to-organization selling	Team-based approach to selling	Team-based, value-based selling approach and solution-based selling
Key trends and disruptions	Individual-oriented	Customer centric; buyer-seller relationship	Integrated marketing communication; Internet	Online retailer; customer retention/loyalty	E-commerce; mobile transaction; social media	Mobile shopping; social media; omnichannel; virtual reality
Key insights	Individual selling approach focused on the salesperson	Adaptive individual selling; focus on buyers and sellers	Mass customization; individual selling approach; inclusion of buying center	Team-based selling/sales team approach; focus on long-term orientation and retention	Team-based selling approach; focus on long-term relationships supported by technologies	Team-based selling approach to create value through in-depth understanding of the customer's business model
Illustrative papers	Evans (1963)	Bonoma et al. (1978), Reeves and Barksdale (1984)	Anderson and Narus (1990), Hutt et al. (1985), Dwyer et al. (1987), Sheth and Parvatiyar (1995)	DeCormier and Jobber (1993), Schurr (1987), Metcalf, Frear, and Krishnan (1992), Wotruba (1991)	Moncrief and Marshall (2005), Möller and Halinen (2000)	Borg and Freytag (2012), Haas et al. (2012)



Notes: The frequency analysis accounts for papers published each decade, for the past 40 years, reflecting keywords associated with relational selling approaches in eight academic journals.

Fig. 1. Frequency analysis – relational selling approaches.

buyers (Borg & Young, 2014; Evans, 1963). The emphasis on the salesperson failed to produce fruitful outcomes though, so other selling approaches emerged (Perreault, Harris, & French, 1977). Around 1970, the selling process expanded to include both seller and buyer perspectives (Borg & Young, 2014). Relational selling theory thus evolved to include exchange and need satisfaction approaches (Parvatiyar & Sheth, 2000), prompting studies that focused on dyadic relationships (Bonoma et al., 1978; Möller & Halinen, 2000).

2.2. Buying center approach

With the argument that previous theories were inadequate, Plank and Dempsey (1980) extended organizational buying models to include environmental, organizational, individual, and buying center perspectives. Industrial selling was growing, and research accordingly proposed that buyer–seller exchanges could constitute ongoing relationships (Dwyer, Schurr, & Oh, 1987; Hutt, Johnston, & Ronchetto, 1985). Popular theories at the time (Anderson & Narus, 1990) reflected growing awareness of the complexity of buyers' needs. Schurr (1987) also suggested an evolution in sales approaches, toward consultative selling and relational contracts. The growth of the service economy and the rapid development of information technology prompted integrated marketing communication, designed to highlight processes for mass customization or one-to-one marketing (Möller & Halinen, 2000).

2.3. Adaptive selling approach

DeCormier and Jobber's (1993) complex model of sales processes includes a counselor selling model, derived from various theories, that includes three constructs: personality knowledge, micro skills, and strategies and processes. In a globally competitive setting, buyers and sellers increasingly engage in collaborative efforts to reduce costs while maintaining quality (Borg & Young, 2014), leading to the expanded use of selling teams and increased attention to customer retention and repeat sales (Reichheld & Sasser, 1990). Another key disruption in this era was the growth of online shopping; for example, Amazon and eBay entered the market in the 1990s. Noting these shifts, Terbeek (1996, p. 93) predicted that the future of retail would entail “redistributing rewards and profits along the consumer's value chain according to value created.”

2.4. Customer orientation and selling approach

In the 2000s, the focus on customers increased significantly. Moncrief and Marshall (2005) suggest an update to the traditional seven steps of selling, to add customer retention, relationship nurturing, value-added, and customer relationship maintenance. More studies also featured adaptive selling and customer orientation considerations. In a meta-analysis, Franke and Park (2006) find that adaptive selling behaviors have stronger effects than customer-oriented selling on a salesperson's performance and satisfaction. Weitz and Bradford (1999, p. 243) highlight the economic value of partnering, proposing that salespeople “work with their customers and their companies to develop solutions that enhance the profits of both firms.” Both value and intra-network connectedness have emerged as positive influences on sales decisions (Borg & Young, 2014). Furthermore, with the growth of social media, mobile devices, and omnichannel retailing, firms have had to spread their marketing budgets across both traditional and e-commerce channels.

2.5. Frequency analysis of relational selling approaches

To substantiate our review findings, we conducted a frequency analysis of keywords associated with each of these four approaches over time, as published in relevant marketing journals (see Fig. 1). The articles came from two prominent databases, Reuter's Web of Science database and EBSCOhost (multiple databases). We found 788 articles that listed a key concept (adaptive selling, buying center, customer orientation and solution selling, buyer–seller relationship, team-based selling) in their title, abstract, or keywords. They appeared in *Industrial Marketing Management*, *Journal of Retailing*, *Journal of Marketing*, *Journal of Marketing Research*, *Marketing Science*, *Journal of Personal Selling and Sales Management*, *Journal of Academy of Marketing Science*, and *Journal of Consumer Research* by 2017. As Fig. 1 reveals, studies of the buyer–seller relationship approach have increased steadily in almost every decade (1970 to 2010). Research on customer orientation and solution selling approaches increased in frequency starting in the 1970s, coming in just behind buyer–seller relationships in popularity. Yet studies on adaptive selling seemingly have plateaued and started to decline in the last decade. Buying centers as a research topic have diminished in popularity since the 1980s. Studies of team-based selling have risen rapidly in number, just passing the frequency of buying center articles. Thus, customer orientation, solution selling, and team-based approaches are the primary areas researchers are investigating to understand buyer–seller relationships today.

2.6. Insights from the evolution of relational selling approaches

The relational selling concept has evolved with a team-based selling approach, as well as with customer orientation and solution selling perspectives. The availability of new technologies, big data, and digital marketing channels forces relational sellers to adapt and use digital methods instead of face-to-face interactions. Digitization has revamped B2B sales; most of the purchase process takes place even before decision makers contact a sales representative. The intersection of online and offline sales channels needs to be more seamless and synergistic. In addition, mobility through smartphones, tablets, and laptops provides customers with continuous access to the latest products and information, which requires sellers to be better prepared for their interactions.

Personalization is becoming increasingly critical, especially with the expanding amount of information available online. Solution selling through consultative approaches can enable sales teams to offer everything from design services to just-in-time delivery, which should reduce the overall cost of the buying process. Collaborative efforts also may become more common. In particular, the shift of dependence and power toward customers implies that putting pressure on buyers will not work. A multidisciplinary approach, throughout the organization, should produce more effective solutions for customers. Finally, studies should explore how industries mirror the evolution of relational selling through the adoption of customer relationship management tactics, including increased reliance on customer relationship or key account managers, instead of just a traditional salesperson or manager.

3. Perspective 2: theories of relational selling

Most of the theoretical frameworks and constructs used to examine relational selling are behavioral, incorporating concepts from social psychology and sociology. With this acknowledgment, we seek to define the evolution of relational selling, from individual, through dyadic, to team behaviors, as well as to capture how theory has adapted to pertinent environmental and technological changes. Finally, we present some possible trends. Table 2 summarizes the key theories and findings for Perspective 2.

3.1. Adaptation theory/adaptive selling behavior

The seed of adaptive selling behavior theory was planted in early sales interaction research (Evans, 1963). Adaptive behavior implies "the altering of sales behaviors during a customer interaction or across customer interactions based on perceived information about the nature of the selling situation" (Weitz et al., 1986, p. 175). A communicator's adaptive style influences a receiver's preference for specific relational messages, so salespeople can work smarter by choosing approaches appropriate for particular customers (Park & Deitz, 2006; Weitz et al., 1986) and adapting their approaches across different relationship stages (Franke & Park, 2006). In B2B relationships, suppliers' adaptive behaviors can increase customer trust, performance, satisfaction, and future interactions (Román & Iacobucci, 2010). Thus, adaptive selling is likely to remain fundamental as businesses continue to face constant changes.

3.2. Commitment–trust theory

Morgan and Hunt (1994) propose that commitment and trust are the two key foundations on which strong customer relationships are built. Commitment is "an enduring desire to maintain a valued relationship" (Moorman, Zaltman, & Deshpande, 1992, p. 316); trust is "confidence in an exchange partner's reliability and integrity" (Morgan & Hunt,

Table 2
Key theories relevant to relational selling.

Key theories	Source theories	Definitions	Key findings	Illustrative studies
Adaptive selling behaviors (theory)	Sales interaction research (Chapple & Donald, 1947; Evans, 1963)	Adaptive behavior: adapting sales behaviors based on perceived situational information (Weitz, Sujan, & Sujan, 1986).	Seller adaptability increases objective performance, customer satisfaction, and future interactions (Román & Iacobucci, 2010).	Franke and Park (2006), Spiro and Weitz (1990)
Commitment-trust theory	Social exchange theory (Cook & Emerson, 1978)	Commitment: a relationship warrants maximum efforts to maintain it (Morgan & Hunt, 1994). Trust: "a willingness to rely on an exchange partner" (Moorman, Deshpande, & Zaltman, 1993, p. 82).	Commitment and trust are important for cooperation, with trust exerting the stronger effect (Morgan & Hunt, 1994).	Anderson & Weitz (1992), Dwyer et al. (1987), Morgan and Hunt (1994), Palmatier et al. (2013)
Interaction/network theory	Sociology (Macneil, 1980)	Exchange processes include information exchange and conflict resolution methods that go beyond switching to a new supplier (Claycomb & Frankwick, 2010).	Long-term orientation and trust increase interdependencies (Claycomb & Frankwick, 2010).	Claycomb and Frankwick (2010), Haas, Snehota, and Corsaro (2012), Palmatier, Scheer, and Steenkamp (2007)
Power dependence theory	Sociology (Emerson, 1962)	"Powerful partners can get others to do something they would not normally do" (Anderson & Weitz, 1992, p. 338).	Mediated and non-mediated power (Maloni & Benton, 2000) affect relationship commitment (Zhao, Flynn, & Roth, 2007).	Anderson and Narus (1990), Heide and John (1988)
Social penetration theory	Psychology (Altman & Taylor, 1973)	Disclosure reveals non-transactional personal or private information (Jacobs, Hyman, & McQuitty, 2001). Relationship satisfaction is an effective response to a relationship (Palmatier, Dant, Grewal, & Evans, 2006).	The more salespeople invest in a relationship, the more services customers are likely to purchase (Crosby, Evans, & Cowles, 1990).	Crosby et al. (1990), Jacobs et al. (2001)
Team selling theory	Buying center (Robinson, Faris, & Wind, 1967)	Core selling: members develop sales strategies for key customers (Moon & Armstrong, 1994). Selling centers include members who initiate and maintain customer relationships (Hutt et al., 1985).	Team selling is more likely for first-time customers of complex products (Jackson, Widmier, Giacobbe, & Keith, 1999).	Jackson et al. (1999), Weitz and Bradford (1999)

1994, p. 23). Commitment and trust are essential for cooperation, with trust producing a stronger effect (Morgan & Hunt, 1994; Odekerken-Schröder, De Wulf, & Schumacher, 2003). Furthermore, Morgan and Hunt (1994) propose a model of relationship marketing in which trust and commitment are the key mediating variables between five antecedents (relationship termination cost, relationship benefits, shared values, communication, and opportunistic behavior) and five consequences (acquiescence, propensity to leave, co-operation, functional conflict, and decision-making uncertainty); with trust exerting a stronger mediating effect (Mukherjee & Nath, 2007). The increase of digital interactions implies that trust likely will continue to have a key role as sales managers work to balance risk and privacy concerns against flexibility demands and advanced technological trends.

3.3. Interaction/network theory

Interaction mechanisms and relationship characteristics (e.g., relationship-specific investment, uncertainty) also are important elements in buyer–seller relationships (Johanson & Mattsson, 1987). This theory highlights exchange, adaptation, and uncertainty elements. Exchange processes include "information exchange and conflict resolution methods that are more problem solving in nature than merely switching to a new supplier"; adaptation processes are "relationship-specific investments in areas such as technology, logistics, administration, financing, and knowledge" (Claycomb & Frankwick, 2010, p. 253). Finally, uncertainty pertains to how "the nature and structure of a buyer–seller interaction influences the degree of uncertainty in a relationship" (Claycomb & Frankwick, 2010, p. 256). Effective relational selling tends to exhibit high levels of joint planning, participation, collaboration, effective communication, and productive conflict resolution (Anderson & Narus, 1990; Dwyer et al., 1987). Interdependencies between firms increase if both buyers and sellers approach their relationship with a cooperative strategy, willing to establish long-term relationships, exchange information openly, and trust each other (Campbell, 1985).

3.4. Power dependence theory

According to social exchange theory, partners with power can influence others (Goodman & Dion, 2001; Zhao et al., 2007). In relational selling contexts, control can be effective for achieving short-term goals but also harm long-term relationships, by weakening the sense of goal congruency between parties (Biong & Selnes, 1995). Buyer–seller relationships feature two types of power: non-mediated and mediated (French, Raven, & Cartwright, 1959). Non-mediated power, which is more relational and positive in orientation, comprises expert, referent, and traditional legitimate forms of power (Maloni & Benton, 2000). Mediated power instead encompasses rewards, coercive, and legal legitimate power, often controlled by the customer (Zhao et al., 2007). Balanced power can facilitate flexibility in the selling approach.

3.5. Social penetration theory

To explain the evolution of interpersonal relationships, social penetration theory highlights the constructs of social disclosure, relationship satisfaction, and self-disclosure. Social disclosure refers to "the volume and the degree to which the disclosure reveals non-transactional personal/private information" (Jacobs et al., 2001, p. 21). Relationship satisfaction reflects customers' affective responses toward a relationship (Palmatier, Gopalakrishna, & Houston, 2006). Self-disclosure indicates that when a person receives positive reinforcement, he or she discloses more personal information (Taylor & Altman, 1975). The relevance of this theory lies in the recognition that buyer–seller relationships may develop at varying speeds, depending on the channels and interaction tools available.

3.6. Team selling theory

A team selling or buying center approach is effective for building relations, especially with complex, large customers or when an individual salesperson lacks the required expertise (Jackson et al., 1999; Robinson et al., 1967). Some key constructs in this context include core selling, selling centers, and key account management. Core selling assigns "organization members … to a particular [key] customer" (Moon & Armstrong, 1994, p. 21), whereas selling centers comprise "organizational members who are involved in initiating and maintaining exchange relationships with industrial customers" (Hutt et al., 1985, p. 33). Finally, key account management entails "the performance of additional activities and/or designation of special personnel directed at an organization's most important customers" (Workman, Homburg, & Jensen, 2003, p. 7). This theoretical framework highlights the changing nature of customer expectations: Buyers demand more personalized services, which likely requires the efforts of a team of sellers, rather than an individual salesperson.

3.7. Insights from theories of relational selling

Adaptation theory, commitment–trust theory, and team-selling theory remain important theoretical frameworks. Modern businesses are experiencing significant changes, due to technology advancements, deregulation, and new competitive tactics. Customers' expectations of salespeople and their organizations will continue to shift and increase, especially in relation to the provision of informative knowledge, rapid responses, and customization. In turn, relational selling will continue to demand team efforts, because sales teams can invest more effectively in long-term relationships and leverage abundant customer information. Moreover, trust will remain a key determinant of the quality of a business relationship. Particularly in the digital era, trust offers an important foundation for future sales transactions; online security measures can be important strategic means to build trust. Finally, several research questions arise for continued research into relational theories and constructs in our digital era: How do businesses adapt to ever-increasing customer expectations? How might adaptation theory be applied in response to the increasing use of technology and consumer analytics? Does the application of commitment–trust theory require any revision to reflect a digital context? Resolving such issues can help managers find the best means to leverage their relationship-building efforts.

4. Perspective 3: review of relationship selling literature

By reviewing extant literature on relational selling, we work to identify strategies, mechanisms, and contexts in which it is most effective, as well as some boundaries. The summary of extant literature in Table 3 follows Palmatier, Dant, and Grewal (2006) framework of relationship marketing effectiveness, in which relational selling strategies are antecedents, relational selling mechanism are mediators, and the factors leveraging both relational selling strategies and relational selling mechanisms are moderators. Marketing literature often labels similar constructs differently, so to establish a solid definitional basis, Table 4 contains a list of key constructs, definitions, and common aliases. In addition, we depict the organizing framework in Fig. 2, in which we group constructs by relevant characteristics and applications. We follow a parsimonious approach, with two goals: apply a model that reflects current research practices (i.e., strategies → mechanisms → outcomes) and present clear and applicable insights for managers. The review highlights the changing role of the salesperson as a relational manager, the challenges and advantages of digital interactions and technology, and the importance of understanding relational dynamics.

Table 3
Relational selling literature review.

Key constructs	Theory	Methods	Context	Key findings	Reference
Relational selling strategies					
Consumer orientation		Survey, scale development	Multi-industry data	• Customer-oriented selling: seller's ability to help customers and the quality of the relationship.	Saxe and Weitz (1982)
Consumer orientation, adaptive selling; self-, manager-, and objective-reported performance		Meta-analysis	Multi-industry data	• Customer orientation increases salespersons' self-rated performance. • Customer orientation increases job satisfaction through adaptive selling behaviors.	Franke and Park (2006)
Salesperson customer orientation		Survey (B2B)	Multi-industry data	• The effect of salesperson customer orientation on selling performance is U-shaped; the effect on customer attitude is increasingly positive.	Homburg, Müller, and Klarmann (2011a)
Sales adaptability, consumer information	• Self-monitoring theory	Survey, scale development	Manufacturing industry data	• Different selling approaches are needed for different customers. • Adaptation is strengthened by the collection and use of customer information.	Spiro and Weitz (1990)
Adaptive selling, discounts, customer loyalty	• Social exchange theory	Survey (B2C)	Retail jewelry	• Customers demand rewards for their loyalty. • Adaptive selling attenuates the negative effects of expensive loyalty programs.	Wieseke, Alavi, and Habel (2014)
Working hard or smart, sellers' knowledge, empowering behaviors	• Social cognitive • Customer-relationship theory	Survey (B2C)	Health care	• Sellers with low levels of product/industry experience benefit the most from leaders' empowering behaviors.	Rapp, Ahearne, Mathieu, and Schillewaert (2006)
Working hard or smart, sellers' perceptions, salesperson behaviors		Survey (B2C)	Retail automobile	• Job involvement/challenges are positively related to working hard/smart.	Holmes and Srivastava (2002)
Competitive intelligence, customer orientation, relationship quality	• Social capital	Survey (B2B)	Logistics	• Competitive intelligence is a function of customer orientation and relationship quality. • Competitive intelligence increases perceived value, profit margins, and share of wallet.	Hughes, Le Bon, and Rapp (2013)
Organizational identification, role conflict, competitive intelligence	• Social identity theory	Survey (B2B)	Hospitality industry	• Organizational identification positively affects collection and use of competitive intelligence. • Role conflict has a negative effect on collection and use of competitive intelligence.	Rapp, Agnihotri, and Baker (2015)
Bilateral communication	• Relational contractual law • Exchange theory	Conceptual		• Relational, as opposed to transactional relationships have positive effects on sales performance.	Dwyer et al. (1987)
Relational investments	• Social exchange theory • Bargaining and negotiation theories		Manufacturing industry data	• Relational investments (e.g., support for the buyer) have positive, significant effects on perceived trust toward the seller.	Anderson and Weitz (1989)
Buyer-seller links, salesperson expertise		Secondary data (B2B)	Multi-industry data	• Replacing a salesperson with someone of similar experience mitigates the negative effects of the severed relationship.	Shi, Sridhar, Grewal, and Lilien (2017)
Perceptions of empowerment, transformational leadership	• Cognitive social learning theory • Job enrichment theory	Survey (B2B)	Multi-industry data	• Sellers' empowerment, a manager with a transformational leadership style, and a positive psychological climate are significant predictors of customer selling orientation.	Martin and Bush (2006)
Relational persuasion, consultation, collaboration, personal appeal	• Stakeholder theory	Survey (B2B)	Manufacturing and real estate firms	• External tactics may not be effective with internal and external business partners. • The influence of internal and external business partners has greater objective effects than a focus on customers alone.	Plouffe, Bolander, Cote, and Hochstein (2016)
Team-selling, organizational and interpersonal relations		Conceptual		• Key team selling relations: (1) team members, (2) members of different teams within the firm, (3) selling team and the buying center, and (4) selling team and other groups within the firm.	Jones, Dixon, Chonko, and Cannon (2005)
Customer prioritization, implementation strategies		Survey (B2B, B2C)	Multi-industry data	• Customer prioritization leads to higher customer profitability and return on sales. • Prioritization positively affects top-tier but does not affect bottom-tier customers.	Homburg, Droll, and Totzek (2008)

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Table 3 *(continued)*

Key constructs	Theory	Methods	Context	Key findings	Reference
Relational selling mechanisms					
Trust, commitment	• Social exchange theory	Survey (B2B)	Tire dealership association	• Commitment and trust are key focal constructs that mediate business relationships. • Commitment is a critical antecedent of financial performance. • Trust and commitment together positively influence performance and relational behaviors.	Morgan and Hunt (1994)
Commitment, trust, relationship quality		Meta-analysis		• Additional mediating mechanisms, beyond commitment and trust, explain the impact of relationship strategies.	Palmatier et al. (2006)
Gratitude, reciprocity	• Social exchange theory	Multimethod experiment and field (B2C, B2B)	Multi-industry data	• Gratitude mediates the effect of relational investments on selling performance. • Gratitude-related behaviors are driven by reciprocity.	Palmatier, Jarvis, Bechkoff, and Kardes (2009)
Dynamic collaboration	• Resource-based view	Multimethod surveys and interviews	Supply-chain industry	• Dynamic collaboration mediates the effects of customer orientation strategies on firm performance.	Allred, Fawcett, Wallin, and Magnan (2011)
Causal attribution, task and social attraction, interpersonal affect	• Information processing theory • Attribution theory	Survey (B2B)	Manufacturing industry data	• The effects of performance evaluations and feedback are mediated by the evaluator's causal attributions of the salesperson's behavior.	DeCarlo and Leigh (1996)
Relational selling outcomes					
Sales growth, sales expansion, sales goals	• Mutual commitment	Survey (B2B)	Manufacturing industry data	• Buyers' perception of sellers' commitment relates positively to sellers' performance, including high satisfaction and low conflict.	Jap and Ganesan (2000)
Sales performance, share of wallet, propensity to switch	• Resource dependence theory • Transaction cost economics	Survey (B2B)	Industrial buyers	• Trust in the salesperson has a positive effect on seller performance outcomes. • Buyers' exchange inefficiencies have negative effects on seller performance outcomes.	Palmatier, Scheer, Evans, and Arnold (2008)
Customer lifetime value selection	• Commitment-trust theory	Secondary data (B2B)	Manufacturing industry data	• Relationship benefits diminish switching behaviors, increase perceived value, and increase brand recollection.	Venkatesan and Kumar (2004)
Word of mouth, referral likelihood, relational investments	• Exchange theory	Experimental (C2C)	Multi-industry data	• Relational investments are particularly effective at increasing customer referrals for weak brands and among weak ties.	Ryu and Feick (2007)
Customer retention, customer share development, loyalty	• Relationship marketing theory • Customer equity theory	Survey and customer data (B2C)	Financial services	• Affective commitment antecedes customer retention and customer share development. • Relational marketing instruments (e.g., loyalty programs) can influence customer retention.	Verhoef (2003)
Cooperation, flexibility, information exchange, problem solving	• Interactivist theory	Survey (B2B)	Manufacturing and supplier data	• A long-term orientation has a positive influence on cooperative behaviors. • Performance ambiguity has a negative effect on cooperative behaviors.	Heide and Miner (1992)
Leveraging relational selling strategies					
Complex goods, unsophisticated buyers, and dynamic environments	• Social exchange theory • Social penetration theory	Survey (B2C)	Whole-life insurance services	• Long-term relationship effectiveness increases when (1) the service is complex and delivered over time and transactions, (2) buyers are uncertain about the product/service, or (3) the environment is changing.	Crosby et al. (1990)
Influence of consumer orientation, customized products, competitive intensity		Survey (B2C)	Multi-industry data	• The objective effects of customer orientation follow an inverted U-shape. • Customer orientation is most effective in a context that includes customized products, premium price strategies, and high competition.	Homburg et al. (2011a)
Sellers' confidence, sellers' motivation, firm orientation	• Categorization theory	Survey (B2C)	Financial services	• The salesperson's perception of the firm's orientation positively affects adaptive selling through the seller's confidence and motivation.	Román and Iacobucci (2010)
Adaptive and non-adaptive conditions	• Contingency theory of adaptive behaviors	Survey (B2C)	Multi-industry data	• Adaptive selling positively affects sales in adaptive and non-adaptive contexts. • Seller's experience affects sales performance in situational contexts.	Giacobbe, Jackson, Crosby, and Bridges (2006)

(continued on next page)

Table 3 *(continued)*

Key constructs	Theory	Methods	Context	Key findings	Reference
Buyer information, working hard or smart	• Social identity theory	Survey (B2B)	Hospitality industry	• High organizational identification and low role conflict positively affect the collection of competitive intelligence.	Rapp et al. (2015)
Buyer prioritization, overly demanding customers	• Social exchange theory	Survey (B2C)	Retail chemical products	• Competitive intensity and prioritization transparency attenuate the negative effects of entitlement-driven behaviors.	Wetzel, Hammerschmidt, and Zablah (2014)
Product category involvement, buyer relationship proneness	• Reciprocal action theory	Survey (B2C)	Food and retail industries	• The effect of relationship investment is contingent on the consumer's perception of the importance of the product category. • This effect is moderated by consumer relationship proneness.	De Wulf, Odekerken-Schröder, and Iacobucci (2001)
Relational phases, salesperson selling behaviors	• Customer relationship theory	Survey (B2C)	Pharmaceutical industry	• Diligence, effective communication, and relational investments increase trust and customer satisfaction after the initial sale.	Ahearne, Jelinek, and Jones (2007)
Seller's intelligence, inaccurate perceptions, relations over time	• Social exchange theory • Assimilation - contrast theory	Survey (B2C)	Consumer and industrial goods supplier	• Salespersons' relational inaccuracies are more harmful earlier than later in the relationship.	Mullins, Ahearne, Lam, Hall, and Boichuk (2014)
Customer migration, relational stage, exploration endowment, recovery, neglect, betrayal	• Relationship marketing theories	Survey (B2B)	Multi-industry data	• Effective communication and product mix helps buyers move from transactional to transitional stages. • Mutual relational investments help organizations move customers from transitional to communal stages.	Zhang, Watson, Palmatier, and Dant (2016)
Leveraging relational selling mechanisms					
Service- vs. product-based exchanges, channels vs. direct exchanges, individual vs. organizational relationships		Meta-analysis		• Relational activities are more important when they occur with an individual rather than an organization. • Customer relationships have a greater impact when relationships are more critical to the success of the exchange.	Palmatier et al. (2006)
Sentiments, actions, performance, channel decision structure, environmental uncertainty		Meta-analysis		• Trust contributes to satisfaction and long-term orientation, beyond performance indicators. • The strength of the effects of constructs correlated with trust is led by sentiment.	Geyskens, Steenkamp, and Kumar (1998)
Interorganizational relationships, emerge, growth, dissolution	• Transaction cost • Agency theory • Exchange theory	Conceptual		• Cooperative interorganizational relationships are cyclical. • Intentions, values, and capabilities moderate commitment.	Ring and van de Ven (1994)
Commitment velocity, sales performance, trust, communication capabilities, investments	• Decision heuristics • Dynamic capabilities • Relationship dynamics	Survey (B2B)	Multi-industry data	• Commitment velocity significantly predicts sales performance. • Trust and communication positively affect commitment velocity early in the relationship. • In latter stages, investment capabilities become more important.	Palmatier et al. (2013)

Table 4
Review of construct definitions, aliases, and representative studies.

Constructs	Definitions	Common aliases	Representative papers
Strategies			
Customer orientation	The process of identifying and understanding customer needs and interests throughout the different stages of the sales encounter.	Customer identification	Saxe and Weitz (1982), Homburg et al. (2011a), Wieseke et al. (2014)
Adaptive selling	Adaptive selling behaviors based on perceived information about the nature of the selling situation.	Adaptive selling behaviors, emotional adaptation	Spiro and Weitz (1990), Román and Iacobucci (2010), Giacobbe et al. (2006), Franke and Park (2006)
Working smart/hard	• Planning of behaviors that will drive sales. • Time and effort, building relations with critical customers.	Planned selling, selling effort	Rapp et al. (2006), Sujan, Weitz, and Kumar (1994), Holmes and Srivastava (2002)
Sales teams	Group of firm members charged with the planning, development, and implementation of sales strategies.	Work teams, customer teams	Weitz and Bradford (1999), Jones et al. (2005)
Customer prioritization	Selection of a group of valuable customers who receive preferential treatment.	Key account management, customer ranking	Homburg et al. (2008)
Communication	The frequency, direction, modality, and message content shared between exchange partners.	Bilateral communication, mutual disclosure, information exchange	Dwyer et al. (1987)
Relationship investments	Seller-driven activities including time, effort, and tangible and intangible resources devoted to a business relationship.	Gifts, resources, idiosyncratic benefits, support, loyalty outcomes	De Wulf et al. (2001), Palmatier et al. (2006)
Seller expertise	"Knowledge, experience, and overall competency of seller" (Palmatier et al., 2006, p. 138).	Abilities, competence, proficiency, skillfulness of the seller	Crosby et al. (1990), Moorman et al. (1993)
Mechanisms			
Trust	"Confidence in an exchange partner's reliability and integrity" (Morgan & Hunt, 1994, p. 23).	Honesty, trustworthiness, credibility	Morgan and Hunt (1994)
Commitment	"An enduring desire to maintain a valued relationship" (Moorman et al., 1992, p. 316).	Normative, affective, and behavioral commitment, obligation	Morgan and Hunt (1994), Moorman et al. (1992), Anderson and Weitz (1989)
Relationship satisfaction	Buyer's affective state resulting from an overall appraisal of its relationship with the seller.	Satisfaction with the relationship	Crosby et al. (1990)
Relationship quality	Multidimensional construct that includes trust, commitment, and relationship satisfaction. "A composite measure of relationship strength" (Palmatier et al., 2006, p. 149).	Relationship strength, relationship condition	Crosby et al. (1990), De Wulf et al. (2001)
Gratitude	Affective and behavioral response to benefits received.	Gratefulness, thankfulness, appreciation	Palmatier et al. (2009), Wetzel et al. (2014)
Dynamic collaboration	Collection of firm resources used to maximize the effects of customer orientation strategies.	Collaboration, dynamic capabilities	Allred et al. (2011)
Causal attribution	Process by which people explain the causes of their behaviors.	Ascription, assignment of behavior	DeCarlo and Leigh (1996)
Outcomes			
Sales performance	Objective and measurable seller performance, including share of wallet, profit, and market share.	Sales growth, sales expansion, sales goals, value creation	Venkatesan and Kumar (2004)
Word of mouth	Informal communications among customers about the experience, usage, or characteristics of a good or service.	Customer referrals	Hennig-Thurau, Gwinner, and Gremler (2002)
Customer loyalty	Multidimensional construct that includes repeat purchases and the desire to maintain long relationships.	Behavioral loyalty	Palmatier et al. (2007)
Cooperation	"Bilateral collaboration, coordination, or cooperative behaviors between the focal party and its partner" (Scheer, Miao, & Palmatier, 2015, p. 700).	Collaboration, coordination, alliance	Scheer et al. (2015), Anderson and Narus (1990), Morgan and Hunt (1994)

4.1. Relational selling strategies

Relational selling strategies have a primary goal of forming, establishing, and maintaining long-term relationships with loyal, profitable customers (Ahearne et al., 2007). Sellers adopt relational strategies at different levels of intensity, depending on the relationship stage (Bonner & Calantone, 2005; Guenzi, Pardo, & Georges, 2007). We account for these strategies, distinguishing them as seller- or manager-driven approaches.

4.1.1. Seller-driven strategies

In introducing the concept of a customer orientation, Saxe and Weitz (1982) emphasized long-term customer relationships, care for others, low pressure selling, and problem–solution selling methods as positive drivers of relational selling. A salesperson's customer orientation is "the degree to which a salesperson identifies and meets customer needs and interests in the different stages of a sales encounter" (Homburg, Müller, & Klarmann, 2011b, p. 56), which in turn benefits the salesperson's performance (Siders, George, & Dharwadkar, 2001). Sales representatives perceive informational clues, behavioral signals, or emotions, then adjust their approaches to match such customer-driven signals. In turn, customers respond more positively to such efforts. Both conceptually and practically, adaptive selling strategies fall under the umbrella of "working smarter" strategies (Rapp et al., 2006). Working smart entails planning suitable behaviors and activities to drive the sales encounter, a capacity to engage in those activities, and an awareness and ability to modify sales approaches in accordance with situational considerations (Sujan et al., 1994).

"Working hard" instead refers to the effort spent to build relationships with potential customers (Holmes & Srivastava, 2002). When they make relationship investments, sellers devote time, effort, and tangible and intangible resources to the business relationship (Smith & Barclay, 1997). Broadly, these investments can be grouped into financial, social, and structural components (Berry, 1995). Although the effects of relational investments depend on the context, social expenditures consistently exert positive and significant effects on profits (Palmatier et al., 2006). Finally, a seller's expertise implies his or her overall competency. When customers identify salespersons' value-creating competencies, they likely invest more in the relationship, in both the short and long terms. Salesperson expertise also has a positive impact on trust; a buyer's perception of a salesperson's expertise is a significant predictor of perceived trustworthiness (Crosby et al., 1990).

4.1.2. Manager-driven strategies

Managers also can motivate salesperson performance. Martin and Bush (2006) identify managerial tactics such as salesperson empowerment, transformational leadership styles, and a positive psychological climate as significant predictors of a salesperson's customer orientation.

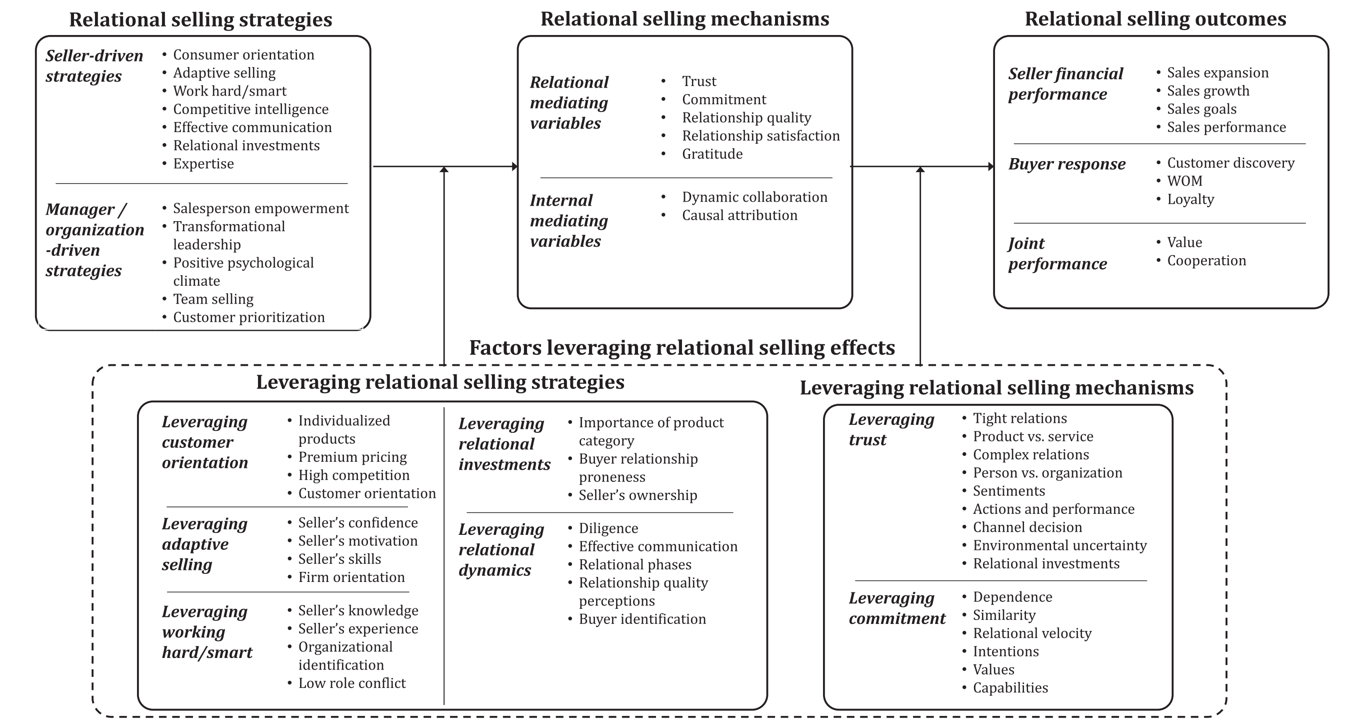

Fig. 2. Organizing framework for relational selling literature review.

In addition, managers should pay attention to (1) team/firm drivers (e.g., organizational culture, climate, policies), (2) team-to-firm drivers (e.g., customer alignment, customer strategy), and (3) team member–-level drivers (e.g., trust, customer focus, leadership) (Jones et al., 2005). The relational selling strategies identified from prior literature thus highlight the role of the seller as a relationship builder and manager. Also, we note that relational strategies are context dependent, such that their effectiveness may be limited to specific circumstances. Thus, we next seek to understand which relational selling mechanisms drive the preceding strategies.

4.2. Relational selling mechanisms

The positive effects of relational selling strategies on sales performance have been well established (Guenzi et al., 2007; Homburg et al., 2011b), but their mediating variables remain subject to ongoing debate. To detail the mechanisms that drive relational selling exchanges, we differentiate between relational and internal mediators.

4.2.1. Relational mediating variables

As we noted previously, Morgan and Hunt (1994) identify trust and commitment as critical mediators, and these topics have dominated relational marketing and selling literature. However, more recent research questions the exclusive status of trust and commitment and implies the potential presence of other important mediating variables (Palmatier et al., 2006; Palmatier et al., 2009). For example, relationship satisfaction mediates how the social and functional benefits received affect a buyer's loyalty and purchase share (Palmatier et al., 2009). Relationship quality (Crosby et al., 1990), a global construct that includes trust, commitment, and relationship satisfaction, mediates the effect of goal congruency on profitable outcomes. Furthermore, gratitude mediates the influence of a seller's relational investments on performance outcomes (Palmatier et al., 2009).

4.2.2. Internal mediating variables

According to a resource-based view, dynamic collaboration sits between consumer orientation strategies and sales (Allred et al., 2011). Multifaceted collaborations can harness the internal skills needed to accommodate customers' needs. In turn, extant research identifies causal attribution as a mechanism that mediates between managers' expectations or performance evaluations and downstream effects, such as the salesperson's motivation, customer relations, or customer engagement (DeCarlo & Leigh, 1996). Yet there is little agreement about which mechanisms actually drive the effects of relational selling on sales performance. Some constructs have been well studied; others suggest vast research opportunities to explicate these complex behaviors and their potential outcomes, as detailed in the next section.

4.3. Relational selling outcomes

The outcomes of relational selling strategies, as influenced by various mediators, encompass outcomes for the seller, those for the buyer, and joint performance outcomes. Critically, these outcomes exemplify the utility derived from relational selling and serve as a sort of measuring stick for evaluating strategies.

4.3.1. Seller financial performance

Companies and organizations evaluate relational selling strategies according to quantifiable outcomes, such as (1) sales performance, which includes sales growth, sales expansion, sales goals, and value creation (Venkatesan & Kumar, 2004); (2) share of wallet, defined as the firm's capacity to penetrate its sales market; and (3) the customer's propensity to switch (Palmatier et al., 2008). Several studies indicate that relational selling strategies can improve financial performance (De Wulf et al., 2001; Palmatier et al., 2009), but others reveal non-significant effects (Crosby et al., 1990). These conflicting findings highlight the need to manage and execute relational selling strategies carefully.

4.3.2. Buyer response

Customer discovery entails the conversion of potential buyers into first-time buyers and then into recurrent customers. Researchers often focus on customer retention and development, yet much remains to be learned about the effectiveness of relational selling strategies for customer acquisition. Initially, the process of acquiring new customers may depend on indirect, relationship-driven efforts, such as when firms use available third-party data to maximize their odds of acquiring profitable customers (Cao & Gruca, 2005). However, if salespeople work to increase their relational orientation, they may need to rebalance their resource allocations across customer acquisition and retention efforts (Reinartz, Thomas, & Kumar, 2005). Accordingly, managers need to analyze how best to allocate resources, depending on the value gained by each type of activity.

Acquisition also can occur through other routes. For example, word of mouth (WOM) that takes place among customers communicates about an experience with, usage, or characteristics of a good or service. Positive WOM can capture new customers as relational partners (Hennig-Thurau et al., 2002; Morgan & Hunt, 1994). The acquisition of customer loyalty also is central to relational marketing and selling (Sheth, 1996). Empirical evidence shows that loyalty programs, driven by relational investments, enhance sales growth, selling effectiveness, customers' willingness to pay, and customer retention (Palmatier et al., 2007).

4.3.3. Joint performance

As noted previously, the mediating effects of trust and commitment strongly influence cooperative outcomes (Anderson & Narus, 1990; Heide & Miner, 1992; Morgan & Hunt, 1994). In this context, cooperation is "bilateral collaboration, coordination or cooperative behavior between the focal party and its partner" (Scheer et al., 2015, p. 700). Deliberate behaviors to create and sustain buyer–seller relationships likely enhance cooperation between them (Sleep, Bharadwaj, & Lam, 2015).

In the next two sections, we identify potential moderators that may influence the linkages in our model. We distinguish those associated with relational selling strategies from those linked to relational selling mechanisms.

4.4. Leveraging relational selling strategies

There is no one best way to execute relational strategies; their effectiveness depends on external conditions. For example, Crosby et al. (1990) suggest that including relational properties in buyer–seller interactions is most critical in contexts in which (1) the service is customized and complex, (2) buyers are relatively unsophisticated, and (3) the environment is dynamic and uncertain. A deeper review suggests organizing such moderators according to specific relational strategies.

4.4.1. Leveraging customer orientation

Despite the benefits of a customer orientation, in contexts dominated by relational selling, a key challenge for any salesperson is evaluating the degree to which a customer orientation drives performance. A customer orientation is optimal if the sales context features individualized products, premium price strategies, and intense competition. The effectiveness of a consumer orientation also is moderated by its components and the extent to which they match with consumers' orientations (Homburg et al., 2011a).

4.4.2. Leveraging adaptive selling

A seller's confidence, motivation, and skills, together with the firm's orientation, positively affect adaptive selling, which has downstream consequences for objective outcomes and customer satisfaction (Román & Iacobucci, 2010). The reach of adaptive selling also may extend beyond contextual boundaries, such that the positive impact of adaptive selling may be observed in non-adaptive selling contexts (Giacobbe et al., 2006).

4.4.3. Leveraging working hard/smart strategies

Several conditions affect the influence of working hard and working smart strategies, as well as their components (e.g., competitive intelligence, customer prioritization). For example, sales representatives with low levels of industry experience benefit most from leaders' empowering behaviors, which then increase their predispositions to work harder (Rapp et al., 2006).

4.4.4. Leveraging relational investments

The outcomes of relational investment strategies are contingent on the consumer's perceptions of the importance of the product category. Strong identification and involvement with a product category intensify the effect of relational investments on relationship quality, as do higher levels of consumer relationship proneness, or predispositions to engage in a relationship (De Wulf et al., 2001). According to Palmatier et al. (2006), B2B salespeople are more effective using their firm's relational investments when they have some ownership or profit-sharing interests in the organization.

4.4.5. Leveraging relational dynamics

Despite the importance of relational dynamics, literature on relational selling mainly adopts a static perspective, with just a few exceptions. For example, Ahearne et al. (2007) account for salesperson behaviors that drive customer share of market after the initial sale. Diligence, effective communication, and relational investments increase customer satisfaction at this point in the relationship, when varied relational dynamics exist. A more recent study notes the dynamic effects of different strategies across relational phases, such that effective communication and a good product mix help buyers move from transactional to transitional stages, but mutual customer–seller relational investments encourage a shift from transitional to communal stages (Zhang et al., 2016). For managers, a thorough understanding of the mechanisms that guide buyers to move across different stages can help them assign relational resources more efficiently.

4.5. Leveraging relational selling mechanisms

4.5.1. Leveraging trust

Exchanges vary from transactional to relational (Anderson & Narus, 1990), so relational mechanisms must be dynamic and context dependent. Palmatier et al. (2006) account for several contexts and their influences on trust. First, some exchanges require tighter relationships. Services (cf. products) are intangible and more perishable, so closer ties can lessen the negative effect of customers' uncertainties in such settings. Second, complex relationships that involve multiple channels require more trust and closer relational bonds than do direct dyads. Palmatier et al. (2006) suggest that consumers may find it easier to rely on a salesperson rather than the whole organization, but misallocations could weaken the relational benefits and, ultimately, harm the relationship. Ahearne et al. (2007) propose instead that salesperson diligence, effective communication, and relational investments positively affect satisfaction, which then influences trust.

4.5.2. Leveraging commitment

Despite its importance, only a handful of studies have investigated factors that might enable firms to leverage commitment in their relational selling efforts. Dependence and similarities across buyers and sellers both have significant influences on commitment (Palmatier et al., 2006). Similar to trust, commitment is dynamic. It exerts an influence across the different phases of the relationship and also moves at different rates and in various directions (Palmatier et al., 2013). Other factors that moderate the role of commitment include consistent demonstrations of the salesperson's intentions, values, and capabilities (Ring & van de Ven, 1994).

4.6. Insights from the review of relational selling literature

Synthesizing more than 50 years of relational selling literature facilitates understanding of the current state but also enables us to provide managerially relevant insights on its changing landscapes. For example, several studies cite the positive effects of technology (e.g., sales force automation) on sales performance (Ahearne, Jones, Rapp, & Mathieu, 2008). In the absence of physical interactions, gaining trust from online customers is a challenge. Whenever possible, organizations should emphasize transparency, data control, privacy, and security measures, as well as their shared values, as key antecedents of trust in online environments (Bart, Shankar, Sultan, & Urban, 2005; Martin, Borah, & Palmatier, 2017; Mukherjee & Nath, 2007).

The changing functions of the salesperson, from relationship builder to relationship manager, indicate some opportunities to leverage extended relationships. Yet these extended relationships also increase managerial complexities, heightening salespeople's role conflict and role ambiguity, whereas sellers' self-efficacy and managers' transactional leadership behaviors can mitigate such negative effects (Schmitz & Ganesan, 2014). The position of sales representatives within an organizational network also influences objective sales outcomes. More interactions with business partners, through the creation of liaison agents or internal salespersons as a single point of contact across external sellers and internal and external business partners, thus might be a promising tactic (see Tenet 5.1 in the next section). The importance of face-to-face relational selling also cannot be dismissed. We recommend that companies invite consumers to co-create relational strategies and empower them to define the relationship formation process. Technology needs to be limited carefully: leveraged to increase efficiencies but not at the expense of interactions with internal and external customers. Customer analytics and big data should inform efforts to match products and services with specific customer demands. Finally, organizations should not impose specific technologies on their whole customer portfolio but instead should define which applications are most useful for each customer.

5. Relational selling tenets for success

Using the preceding temporal, theoretical, and empirical insights, we identify six key tenets for effective relational selling in the future. A summary of these tenets and future research directions is in Table 5.

5.1. Increase the strategic role of inside sales organizations

Advanced technology and e-commerce have fundamentally changed relational selling and buyer–seller interactions. Buyers express increased preferences for online interfaces; nearly 75% of B2B buyers regard buying from a website more convenient than relying on a sales representative, and 93% prefer to buy online once they have decided what to purchase (Hoar, 2015). Thus, inside sales is likely to become an increasingly important component for building relational selling bonds. When online channels break down or fail to satisfy customers' needs, an inside salesperson is a more convenient recourse (e.g., immediate, easy, little social pressure) than waiting on an outside salesperson to visit or return a call. Strong, performance-enhancing relationships can be built online, even without face-to-face contact (Kozlenkova, Palmatier, Fang, Xiao, & Huang, 2017), leading firms to add more inside salespeople, relative to outside salespeople, and even turning account control over to them in some situations. Managers also should allocate resources according to changing relational dynamics, such that rich face-to-face communication and relationship building efforts may be impactful early in the relationship lifecycle, but inside salespeople might prefer email and phone communication during relationship maintenance stages (Palmatier et al., 2013). In contrast, inside salespeople may be relatively ineffective for winning back lost customers or for selling new, innovative, complex solutions (Sales Management Association, 2014). On the basis of this evidence, we recommend a team-based sales structure. Outside salespeople focus on initial relationship building, step in to sell more complex solution offerings as needed, and recover lost business. Inside salespeople maintain the relationship and cover sales when the e-commerce channels break down. Firms thus should develop team-based sales structures that motivate, compensate, and train sales teams to operate successfully in this new environment, which often requires breaking old customs and sales traditions. For example, the semiconductor manufacturer Microchip Technology shifted its compensation strategy from individual compensation (60% salary, 40% commission) to team-based compensation, with a 90% base salary and 10% linked to corporate, rather than individual, results. As a result, attrition dropped, and employee retention rose (Pink, 2012).

In turn, research in this area needs to address several key questions. What antecedents, barriers, and consequences arise from transitions between inside and outside sales? Can different industries (e.g., manufacturing vs. services) adopt hybrid sales approaches? As organizations expand, what is the ideal ratio between inside and outside salespeople? If customers create personal bonds, can firms switch between outside and inside sellers without disrupting the relationship? What are the best methods for building strong customer relationships in a predominantly online environment? Finally, studies should investigate how these trends may influence practices for recruiting effective salespeople, especially considering the significant increase in the number of inside sales job in recent years.

Table 5
Future research directions.

Tenets	Future research
1. Increase the strategic role of inside sales organizations	• Antecedents, barriers and consequences of inside sales. • Differences between industries on the adoption of inside sales. • Ideal ratio between inside sales versus outside sales. • The relationship effect of switching between inside and outside sales. • Recruitment practices in hiring inside sales.
2. Gain customer insights in e-commerce, digital, privacy and legal environments	• Understanding customers' needs in a new digital environment. • Sales people approaches to generate leads through e-commerce. • The role of face-to-face interactions in the digital era. • Trust and commitment toward the salesperson in data sharing.
3. Integrate relationship building strategies across omnichannel interfaces	• Optimizing customer experience across channels. • The effect of omnichannel strategies on the depth and breath of buyer-seller relationships.
4. Understand the influence of technological applications across relational contexts	• Technology as a bridge or as a barrier in relational selling. • Individual differences in the use and adoption of new technologies. • Technological tools and its influence across the different phases of a business relationship.
5. Use big data insights for more effective relational selling	• Integrating relational selling into big data practices and outcomes across customer lifecyles • Balancing data gathering with privacy concerns
6. Leverage artificial intelligence for relational selling	• The effects of AI in building and sustaining relationships. • The moderating effects of AI strategies.

5.2. Gain customer insights in e-commerce, digital, privacy, and legal environments

Organizations' ability to develop business relationships is hindered by regulations that limit the relational investments companies can offer (e.g., salespeople may not take customers to lunch) and privacy rules that limit information sharing. Such shifts significantly undermine salespeople's traditional methods for gaining customer insights, which are critical for developing innovative products and services. Thus, firms and salespeople need to find ways to build and maintain sufficiently strong relational bonds and learning opportunities so that customers feel comfortable and embrace existing forums for sharing their emerging needs. Reduced social or face time with customers makes it difficult to uncover latent needs; salespeople thus must be more targeted in seeking customer insights during their limited customer-facing interactions. Simultaneously, firms should devote time and effort to resolve privacy requirements so that customers feel comfortable sharing systematic information with the sellers. E-commerce may be efficient, but its ability to reveal emerging needs can be limited. New capabilities added to existing online channels might enhance customers' opportunities to communicate unsatisfied needs, which then could generate sales leads and trigger a visit from an outside salesperson.

In the digital era, firms are also called on to develop non-transactional exchanges through online channels (Van Doorn et al., 2010). A key consideration is the digital footprint that these firms leave behind, because positive signals can reduce the inherent risks of online relationships (Kozlenkova et al., 2017) and establish a foundation for future transactional exchanges. Because e-commerce platforms create more complex relationships (i.e., seller–platform–buyer; Chakravarty, Kumar, & Grewal, 2014), it is important to determine if relational selling strategies apply beyond the more commonly studied dyadic structure. Noting demands for a more dynamic view of relational selling, the impacts that digital relationships exert across different phases of a buyer–seller relationship also are pertinent, reflecting the need to evaluate the effectiveness of online platforms as the relationships progress over time.

Thus, the central research questions are as follows: How can firms gain a better understanding of customers' emerging needs in this new environment? How should salespeople generate new product or solution leads from e-commerce customers? Is it possible to generate customer insights more efficiently through face-to-face selling opportunities? How might trust in and commitment to a salesperson offset customers' concerns about sharing information?

5.3. Integrate relationship building across omnichannel interfaces

A seamless customer experience across channels has become a requirement in many B2B settings. Industrial buyers expect a consistent experience, whether they obtain the offerings online or in-person; they are disintermediating established relationships by bypassing conventional middlemen or authorized channel members (e.g., wholesaler, distributor). Thus, well-designed channel structures are breaking down as buyers search the Internet and find new sources. Price discrimination across different channels often is no longer viable. Similar to the developments in consumer markets, we argue that an effective omnichannel strategy will be fundamental to B2B success in the future, and relationship selling must account for this transition to retain customers (Rudolph, 2015). General Electric offers such a seamless omnichannel experience by targeting specific buyers through various social media channels (Neisser, 2015). With such a strategy, inside salespeople (Tenet 5.1) become channel managers who ensure that, even if a particular channel does not capture a particular order, it still receives some "credit" for an ultimately successful outcome. This approach might be assisted by big data analytics (Tenet 5.4), in that customer information can define the ways to facilitate and personalize the purchase experience across channels and help resolve sales attribution challenges. Furthermore, such an approach could enable some dynamic pricing across channels.

Continued research should focus on optimizing the customer experience across channels. We also need to understand how state-of-the-art omnichannel technologies and applications influence the depth and breadth of the relationship between buyers and sellers. Not all customers have the same expectations; they often require different touchpoints, and they exhibit distinct relational profiles. Can omnichannel interfaces help deepen the relationship between buyer and seller, or are they merely perceived as a necessary convenience?

5.4. Understanding the influence of technological applications across relational contexts[1]

Depending on the business context, interactions between software applications may be as important as human relationships. Modern companies frequently share software applications to conduct business operations, though software compatibilities depend on the type of business relationship they share. Thus, we cannot generalize the applicability of any particular relational strategy across all business relationships, because their effects depend on the different technologies being implemented. Consider, for example, relationships between knowledge workers and businesses. These workers expect the same technologies they use at home to be available for corporate use, in a development referred to as the consumerization of IT (Moschella, Neal, Opperman, & Taylor, 2004). Accordingly, the Workplace function by Facebook relies on the same basic infrastructure that underlies its consumer operations but features workplace-related tools that integrate the entire organization. Google's G-Suite similarly offers popular applications like Gmail and Google Calendar to enterprises, which helps reduce training and adoption barriers (Thompson, 2016). Such preferences and developments create interesting dynamics, in that users become internal sellers of the focal software, in contrast with previous practices in which the IT department imposed the use of specific software platforms.

Expanding this view to relationships across the supply chain, technology can establish common platforms. For example, a partnership between Oracle and Ford created AutoXchange, a portal in which more than 30,000 suppliers share information with Ford, such as demand forecasts and production schedules, allowing real-time informational flows that helped Ford become more customer centric in its approach (Skjøtt-Larsen, Kotzab, & Grieger, 2003). With the advent of cloud computing, informational flows should move even more efficiently. However, trust concerns may affect the adoption and implementation of these technologies; managers must carefully monitor where, how, and to whom to make information available. Research is needed to investigate the role of technology and the conditions in which it serves as either a bridge or a barrier to relational selling. It also may be pertinent to evaluate how individual differences inform the interaction of relationship-building strategies and the use of technology, such as technology readiness (Parasuraman, 2000). Dynamic relationships further suggest the need for a better understanding of how technological tools interact and affect business relationships across different stages.

5.5. Use big data insights for more effective relational selling

The increasing number of business transactions performed through digital platforms gives companies new opportunities to accumulate massive amounts of structured and unstructured data (Sun, 2006). This information has the potential to change the manner in which organizations relate to their buyers. However, "bigger is better" might not apply in this case; organizations already are struggling to use their massive data effectively. Instead, fast and actionable data may come to

[1] We thank an anonymous reviewer for feedback and examples related to this tenet.

replace big data, so companies need to focus on gathering and using the right type of information more effectively (Marr, 2016). A pertinent use of data analytics might be to identify trigger points for relational selling. Such unique, customer-driven events prompt demand for a relational selling approach, such that a salesperson's visit occurs only as needed for the buyer. In other words, “companies should use advanced predictive techniques, fueled by existing historical knowledge of customers, to build propensity models that help marketers predict the likelihood” of a customer's need (Sridharan & Purcell, 2015, p. 8). Customer analytics in turn must be dynamic and pervasive across the procurement lifecycle, integrating relational selling as needed and when desired by the customer. Delphi, an auto part supplier, has built partnerships to cover each step in the big data path, starting from within the car, moving to the cloud, and then organizing the data for revenue generation (Korosec, 2017). The future of big data and customer analytics research, combined with relational selling, thus is promising. Research should integrate relational selling into big data practices and outcomes across customer lifecycles, which might function as a sort of lead generation system for relational selling. Organizations also need to understand how to balance their data gathering efforts with customers' privacy concerns.

5.6. Leverage artificial intelligence for relational selling

By creating a great customer experience, firms seek “to build a relationship with the customer to understand them as an individual, and to talk to them with context throughout the customer journey” (Thomas, 2016, p. 1). Artificial intelligence (AI) can help achieve this goal. A reported 85% of managers plan to invest in AI-related sales technologies soon (Accenture, 2017). Not only can AI create and maintain a consistent procurement experience across every interaction, but it also can tailor the experience to each customer and react rapidly to new products or strategies. In 2016, Microsoft purchased LinkedIn to assist Cortana, its AI-powered personal assistant, which granted it access to a vast pool of personal and professional data, unmatched by other large corporations (Weinberger, 2016). When IBM and Salesforce integrated their AI platforms (i.e., Watson and Einstein), both companies gained capacity to make more precise decisions faster (Nusca, 2017). With AI in place, relationships with customers likely will be multidimensional, spanning complementary channels (see Tenet 5.3), which should build stronger customer relationships across multiple touchpoints (e.g., online, inside sales, outside sales). In a sense, AI can add “smarts” to big data, acting like a human who can seamlessly integrate sales resources at appropriate stages in the process. Managers thus should seek synergies among salespeople, data analytics, AI, and automated sales systems; such interactions may even produce a more human experience. In coming years, most customers will purchase “goods and services through a digital ‘middle man’—such as messaging platforms, connected devices or smart assistants” (Accenture, 2017), so research should investigate ways to build relationships between customers and virtual agents. Does the type of product, context, or culture moderate the expected effects of AI on selling success? How can firms motivate sales teams once these technologies are in place, and what is the expected role of the “human” sales force?

6. Conclusion

To clarify the myriad challenges and recent developments in sales settings, this article provides an in-depth review of relational selling research, producing a three-part perspective and comprehensive analysis of the field. As Perspective 1 shows, the evolution of the selling process has been from a linear, economic process to a focus on closing to a value-based approach that involves value co-creation in complex social networks. With Perspective 2, we analyze key theories and constructs, which suggest that research will expand the focus on relationship marketing and team-based selling theory. The complexity of buyers requires a team effort and a long-term orientation. The literature review underlying Perspective 3 further indicates that several key relationship characteristics and attributes will influence relational selling goals. In particular, co-creation can empower consumers' relation formation. The changing nature of technology and globalization imply that relational selling will continue to evolve, and salespeople will need to learn to deal with larger, more organized buyers who demand more from them. Companies should seek ways to add value, enhance salespeople's networks, link internal experts, facilitate efficient communication, and ensure timely responses to customers' demand. We expect that relational selling will continue to grow in sophistication, with an increasingly prominent influence over the success of business relationships.

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