

# Salespeople Performance Evaluation Criteria in India

**Ram Kumar Dhurkari**

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*An empirical study is conducted among 90 sales and marketing managers in India to understand the degree of importance given to the top four criteria (and eight sub-criteria) from the list used for the performance evaluation of salespeople in India. The top four criteria are 1. Knowledge (Product Knowledge and Competition Knowledge) 2. Personal Characteristics (Attitude and Initiatives) 3. Skills (Selling skills and Communication skills) and 4. Self-management (Judgement/Decision-making ability and planning ability). These four criteria are not equally important for salespeople performance evaluation. Personal Characteristics and Skills received higher mean weightage than Knowledge and Self-Management. Personal characteristics & soft skills depend upon an individual's own capabilities and efforts, thus receiving higher mean weightage.*

**Ram Kumar Dhurkari** is Assistant Professor in Indian Institute of Management Sirmaur, Himachal Pradesh, India 173025. E-mail: ram.dhurkari@iim sirmaur.ac.in

## Introduction

In any sales organization, the promotion of salespeople through performance appraisal is a process of selecting a set of individuals whose qualifications and skills match or exceed that of the desired qualities normally required to perform the defined job in the best way. The organizations either make the performance appraisal process very strategic, thus utilizing rigorous and costly procedures, or use any inexpensive and quick decision procedures which involve the usage of available information heuristically. Performance evaluation of salespeople is crucial and essential for organizations to ensure alignment of salespeople's efforts towards overall corporate efficiency and profitability. Marketing scholars are continuously investigating different ways to improve the performance evaluation of salespeople (Avila, Fern & Mann, 1988; Dubinsky, Skinner & Whittler, 1989; Jaworski & Kohli, 1991; Marshall, Mowen & Fabes, 1992; Mckay, Hair, Johnston & Sherrell, 1991; Morris et al., 1991). Conducting effective performance evaluation and appraisal of salespeople is a challenging task as it involves tangible as well as

intangible attributes of salespeople. A poorly designed performance evaluation and appraisal system directly affects the motivation and productivity of salespeople. In addition, it increases role conflict and ambiguity, and sometimes salespeople's turnover (Anderson & Chambers, 1985; Churchill, Ford, Hartley & Walker, 1985). Further, it is reported that a poor evaluation system alone has a stronger causal impact on the job-related behavior of salespeople (Anderson & Chambers, 1985). It is found that an effective evaluation system is one of the major sources of feedback for managers and salespeople as it directs them on how selling tasks can best be accomplished (Jackson, Keith, & Schacter, 1983; Rosenbloom & Anderson, 1984).

This study is an attempt to understand important criteria used for performance evaluation of salespeople in India. The literature on salespeople performance evaluation from the last four decades is examined to compile a list of important criteria. The inputs from the literature on the usage of these criteria are aggregated. An empirical study conducted among 90 sales and marketing managers in India to understand the degree of importance given to the top four criteria.

### **Compilation of Literature**

When multiple criteria are used for the performance evaluation of salespeople, managers need to have some mechanism of weighting the performance on different criteria. Except a few (e.g., Miller & Feinzing, 1993; Liang & Wang, 1994; Capaldo & Zollo,

2001; Karsak, 2001; Golec & Kahya, 2007; Güngöra, Serhadlioglu & Kesen, 2009; Dagdeviren, 2010; Dursun & Karsak, 2010; Torfi, Farahani & Rezapour, 2010; Keršulienė & Turskis, 2011; Mano-harana, Muralidharan & Deshmukh, 2011; Kabak, Burmaogelu & Kazançogelu, 2012), previous research on salespeople performance evaluation mostly focused upon identifying appropriate criteria and measurement procedures for evaluation (Darmon & Martin, 2011; Madhani, 2015). The criteria used for salespeople performance evaluation are a combination of quantitative and qualitative indicators of performance. The most widely used quantitative measure for performance evaluation of salespeople revolves around sales volume. However, in this study, the quantitative indicators of performance are intentionally ignored because the weight importance of quantitative indicators can be computed directly without much intervention of the decision-maker (DM). The extant research on the usage of different qualitative indicators of performance is reviewed and analyzed to select the a few top criteria. Various researchers empirically investigated the percentage of usage (the percentage of respondents who use a particular criterion) of different criteria for salespeople performance evaluation (Table 1). But the usage pattern does not reflect the importance given to various criteria. Therefore, other studies are also reviewed and analyzed which examined the ratings given by managers to various criteria for the salespeople performance evaluation (Table 2). Av-

erage percentage usage and an average rating of all the criteria were calculated and rank-ordered separately. The average of these two ranks is computed. Results are provided in Table 3. The top four criteria and eight sub-criteria are selected in the later part of the study.

**The most widely used quantitative measure for performance evaluation of salespeople revolves around sales volume.**

Further, the most widely used quantitative measure for performance evaluation

**Table 1 Empirical Studies on Percentage Usage of Various Qualitative Criteria of Performance Evaluation of Salespeople**

Study	Authors	Location	Single/Multiple Organizations	Sample Size	Objective
1	Jackson, Keith, & Schlacter (1983)	USA	Multiple	213	Study of Practices of Evaluation of Selling Performance
2	Jackson, Schlacter & Wolfe (1995)	USA	Multiple	215	Determine Bases used by Sales Manager for Evaluating Salespeople Performance
3	Jobber, Hooley, & Shipley (1993)	UK	Small Firms	216	To Examine Relationship Between Organizational Size and Evaluation Practices
4			Large Firms	216	
5	Pettijohn, Pettijohn & d'Amico (2001)	USA	Multiple	115	Characteristics of Appraisal Process
6	Pettijohn, Parker, Pettijohn & Kent (2001)	USA	Multiple	214	Salespersons Perception of Usage of Criteria in Performance Appraisal

**Table 2 Empirical Findings on Relative Importance of Various Qualitative Criteria for Performance Evaluation of Salespeople**

Study	Authors	Location	Single/Multiple Organizations	Sample Size	Objective
1	Taylor, Pettijohn, & Pettijohn, (1999)	USA	Multiple	52	Examine Relative Importance of Criteria in Performance Appraisal Process in Retail Sales
2	Morris et al., (1991)	USA	Multiple	104	Investigation of Practices of Salesforce Evaluation
3	Patton & King (1985)	USA	Multiple	242	Modeling Human Judgment for Salespeople Overall Evaluation
4	Patton & King (1985)	USA	Multiple	242	Promotion Decision

of salespeople revolves around sales volume. But this measure was intentionally not included in the hypothetical problem designed here. This is to avoid outcome bias of the decision-maker (DM). Outcome bias (Baron & Hershey, 1988; Hawkins &

Hastie, 1990) occurs when a manager develops the tendency to overweight outcomes and underweight qualitative indicators of performance if a salesperson is performing very well on the selling side and rated very high on output measures.

**Table 3 Rank Ordering the Average Percentage Usage & Average Importance Rating of Various Criteria for Performance Evaluation of Salespeople**

Sr	Criteria	Sub Criteria	Average Percentage Usage	Average Rating (Higher the better)	Rank (Average Percentage Usage)	Rank (Average Rating)	Average Rank
1	Knowledge	Product Knowledge	75.47	4.66	5	1	3
2	Objective Outcome	Sales Volume	74.38	4.6	6	2	4
3	Personal Characteristics	Attitude	78.43	4.34	3	6	4.5
4	Skills	Selling Skills	78.52	4.05	2	9	5.5
5	Knowledge	Competition Knowledge	76.7	3.74	4	13	8.5
6	Skills	Communication	67.67	4.23	11	7	9
7	Personal Characteristics	Initiative	69.12	3.91	9	10	9.5
8	Self-management	Planning Ability	72.35	3.86	7	12	9.5
9	Objective Outcome	Sales as % of Quota	59.5	4.4	16	4	10
10	Self-management	Judgment/ Decision making	68.55	3.87	10	11	10.5
11	Customer Relations	Customer Relations /satisfaction/goodwill	49.5	4.52	22	3	12.5
12	Personal Characteristics	Ethical behavior	59	4.12	17	8	12.5
13	Personal Characteristics	Appraisal Conducted	79.6	0	1	26	13.5
14	Self-management	Time management	62.93	3.72	13	14	13.5
15	Objective Outcome	Number of new accounts	70	1.8	8	23	15.5
16	Personal Characteristics	Appearance	62.58	2.83	14	19	16.5
17	Personal Characteristics	Creativity	55.33	3.62	20	15	17.5
18	Knowledge	Knowledge of Company Policy	58.03	3.47	19	17	18
19	Personal Effort	Sales Presentation	0	4.36	31	5	18
20	Interpersonal Relations	Teamwork	67	0	12	26	19

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21	Self-management	Report Preparation	53.22	3.16	21	18	19.5
22	Interpersonal Relations	Cooperation	62	0	15	26	20.5
23	Objective Outcome	new account sales	58.93	0	18	26	22
24	Personal Characteristics	Citizenship	22.5	3.53	29	16	22.5
25	Job Knowledge	Resourcefulness	49	0	23	26	24.5
26	Objective Outcome	Number of orders	47	1.8	26	23	24.5
27	Work habits	Attendance	49	0	23	26	24.5
28	Objective Outcome	Profitability of sales	22.5	2.6	29	21	25
29	Objective Outcome	Number of customer complaints	0	2.7	31	20	25.5
30	Personal Characteristics	Aggressiveness	48.3	0	25	26	25.5
31	Objective Input	Number of calls	32.35	1.6	28	25	26.5
32	Objective Outcome	Profitability of sales	38.55	0	27	26	26.5
33	Work habits	Expense Control	0	2.53	31	22	26.5

### Research Methodology

A hypothetical problem on salespeople promotion decision is designed in which the respondents (sales and marketing managers in this study) are required to screen 10 potential candidates. A set of hypothetical profiles of salespeople was provided who may be suitable for a first-level managerial position in sales in an upcoming area/territory. The respondents were requested to assume as if they are doing this task for their current organization. The full profile orthogonal design method is used to generate unbiased profiles of salespeople. Using the SPSS orthogonal design functionality, a total of 49 profiles of salespeople generated using eight factors (criteria) with five levels each. When profiles are generated orthogonally, it ensures that the criterion does not depend upon each other. The five levels of performance were indicated using a five-point fuzzy rating scale adopted from Dursun &

Karsak (2010). In the questionnaire, each of the criteria levels (of salespeople profiles) was color-coded so that respondents can quickly screen potential candidates. The color-coding scheme is: VP: Very Poor (Red), P: Poor (Pink), F: Fair (White), G: Good (Light Green), VG: Very Good (Green)]. These 49 profiles of salespeople are provided in Table 4. These 49 profiles are varying on 4 criteria (and 8 sub-criteria). The questionnaire was administered using a computer in the presence of the author. The questionnaire contained a pdf document and Microsoft® Excel® workbook. The pdf document was used to describe a case situation in which a group of salespeople is required to be evaluated and assessed for promotion to a first-level managerial position in sales in an upcoming area/territory.

Respondents were requested to read the problem statement and fill in their responses in the Excel workbook. The

**Table 4 Orthogonally Generated Profiles of 49 Salespeople**

ID	Knowledge		Personal Characteristics		Skills		Self-Management	
	Product Knowledge	Competition Knowledge	Attitude	Initiative	Selling Skills	Communication Skills	Planning ability	Judgment & Decision Making Ability
1	F	G	VP	G	F	VP	VG	G
2	G	F	P	VP	VG	VP	VG	VG
3	VP	VG	VP	VG	VP	F	G	VG
4	VG	VP	P	F	G	VP	G	G
5	VG	VG	F	VP	F	VG	VP	VP
6	VG	F	VG	VG	VP	VP	F	P
7	F	VP	VP	VG	VG	VG	VP	F
8	VP	G	VG	VP	G	F	P	F
9	G	G	VP	F	VP	G	F	VP
10	VP	F	F	G	G	G	VP	VP
11	P	VP	F	P	VG	F	F	G
12	P	P	VG	G	VG	P	G	VP
13	G	VG	VG	P	P	P	VP	G
14	VG	G	G	P	P	P	VP	VG
15	P	P	G	VG	G	P	VG	VP
16	VP	VP	VG	F	P	VG	VG	P
17	P	VG	P	P	VP	G	VG	F
18	P	VP	VG	VP	F	G	P	VG
19	VP	VG	G	F	VG	VP	P	VP
20	VP	P	P	G	P	VG	F	VG
21	P	F	G	VP	VP	VG	P	G
22	F	VP	G	VP	P	G	G	P
23	G	VP	G	G	VP	F	VP	P
24	F	VG	P	VP	G	P	F	P
25	G	P	F	VP	P	VP	G	F
26	F	P	F	F	VP	P	P	VG
27	VP	P	G	P	F	VP	F	F
28	VG	P	VP	P	VG	G	P	P
29	VP	P	P	VG	P	G	VP	G
30	G	P	VP	P	G	VG	P	P
31	P	G	P	P	VP	VG	G	VP
32	VG	P	VP	VP	P	F	VG	VP
33	G	VP	P	VG	F	P	P	VP
34	P	G	F	VG	P	VP	P	P
35	VG	VP	P	G	VP	P	P	F
36	VP	F	VP	P	F	P	G	P
37	P	F	VP	F	P	P	VP	F
38	P	P	P	F	F	F	VP	P
39	F	F	P	P	P	F	P	VP
40	P	VG	VP	G	P	VP	P	P
41	P	VP	VP	P	G	VP	VP	VG
42	VP	G	P	VP	VG	P	VP	P

43	F	P	VG	P	VP	VP	VP	VP
44	VP	VP	F	P	VP	P	VG	P
45	VP	P	VP	VP	VP	P	P	G
46	P	VP	VP	VP	P	P	F	VP
47	VP	VP	VP	VP	VP	VP	VP	VP
48	P	P	P	VP	VP	VP	VP	P
49	VP	VP	P	P	P	VP	P	VP

Note: VP: Very Poor, P: Poor, F: Fair, G: Good, VG: Very Good.

target sample for this study was senior managers (sales and marketing) from various organizations. This is because senior managers are familiar with this kind of task and will be able to understand the problem quickly in their organizational context, thus, giving responses precisely and correctly. A total of 90 valid responses collected from sales/marketing managers who were participating in various short-term and long-term management development programs in one of the popular management education institutes in India. The average experience of these 90 managers was 148 months (approximately 12.5 years) at the time collecting the response.

In the process of collecting response, a respondent was first requested to define the relative importance of each of the four criteria for the evaluation of any salesperson. A scale of 1 to 100 was pro-

vided to respondents to define the relative importance for each of the four criteria in such a way that the sum of the relative importance of all the criteria is exactly equal to 100. In order to ensure the validity of relative importance, the respondents were then asked to screen at most 10 potential candidates from 49 profiles of salespeople for the first level managerial position in sales in the upcoming area/territory. These 49 profiles were provided in the form of indicative ratings on four criteria and 8 sub-criteria as shown in Table 4. Through the problem description, the respondent was informed that these ratings are recently given by the immediate supervisor of the respective salesperson. Once the top 10 profiles are screened, the respondent was requested to rate these 10 profiles separately on each of the criteria using a bipolar scale of -100 to +100 (Table 5) taken from Dhurkari (2019).

**Table 5 Bipolar Scale to Rate the Alternatives**

+100	Very Strong Positive Preference from Reference Point
+75	Strong Positive Preference from Reference Point
+50	Definite Positive Preference from Reference Point
+25	Weak Positive Preference from Reference Point
0	Indifferent (required minimum level of satisfaction or reference point or gain-loss boundary)
-25	Weak Negative Preference from Reference Point
-50	Definite Negative Preference from Reference Point
-75	Strong Negative Preference from Reference Point
-100	Very strong Negative Preference from Reference Point
USE INTERMEDIATE VALUES WHEN COMPROMISE IS NEEDED	

**Analysis & Results**

The descriptive statistics and ANOVA test results are provided in Table 6. The mean relative importance indicated in Table 6 is context-independent which means that the respondent has defined the relative importance of each of the criteria without having any knowledge about how the salespeople might be performing on these criteria. It is clear from the results that Personal Characteristics received the highest mean importance followed by Skills, Self-Management, and Knowledge. The ANOVA results indicated that the mean relative importance is significantly different

across four criteria. Tukey-Kramer test conducted to know which pair of criteria are significantly different. Results of the Tukey-Kramer test indicated that except for the two pairs of criteria viz. (Knowledge vs Self-Management) and (Personal Characteristics vs Skills), all other four pairs of criteria indicate a significant difference in their mean relative importance (Table 7).

**Personal Characteristics received the highest mean importance followed by Skills, Self-Management, and Knowledge.**

**Table 6 Descriptive Statistics & ANOVA of Relative Importance of Four Criteria**

ANOVA: Single Factor						
SUMMARY						
Groups	Count	Sum	Average	Variance		
Knowledge	90	18.66	0.207333	0.009276		
Personal Characteristics	90	26.29	0.292111	0.012183		
Skills	90	24.96	0.277333	0.011991		
Self-Management	90	20.09	0.223222	0.010155		
ANOVA						
Source of Variation	SS	df	MS	F	P-value	F crit
Between Groups	0.455216	3	0.151739	13.91959	1.33E-08	2.629987
Within Groups	3.880784	356	0.010901			
Total	4.336	359				

**Table 7 Results of Tukey Kramer Test**

Knowledge	Personal Characteristics	0.085*
Knowledge	Skills	0.07*
Knowledge	Self-Management	0.016
Personal Characteristics	Skills	0.015
Personal Characteristics	Self-Management	0.069*
Skills	Self-Management	0.054*
Critical Value		0.038

\*Significantly different

Since the salespeople profiles are orthogonally generated, there were some impractical cases generated by SPSS. Respondents raised concerns about the absence of possible interdependencies among some set of criteria which is not reflected in the set of profiles. For example, a salesperson having very good selling skills is bound to have average or above-average product knowledge. However, all the respondents were warned that these profiles are hypothetical and contrast ratings or impractical cases are possible. Since the objective of the second part of this study is to validate the context-independent relative importance given by the respondents to each of the criteria, the impractical profiles are acceptable. If a salesperson is very good (very poor) in all aspects, that salesperson will be selected (rejected) without any tradeoff. But when a salesperson is doing well on certain aspects and poor on other aspects, the DM needs to do some tradeoff which is required to be captured by this study. The salespeople profiles used in this research are made complex enough to activate the decision-making process of the respondents and thus providing enough opportunity to capture it.

**Salesperson having very good selling skills is bound to have average or above-average product knowledge.**

A sample rating as defined by one of the respondents is provided in Table 8. These ratings were then used to generate the relative importance of the criterion using the Attribute Dynamic Attitude Model (ADAM) of Zeleny

(1976). According to Zeleny (1974: 177) "A weight assigned to [an] attribute as a measure of its relative importance for a given decision problem, is directly related to the average intrinsic information, generated by a given set of alternatives through the .... attribute, as well as to its subjective assessment". According to Zeleny (1976), each criterion has an anchor point (or interior ideal point) and the dispersion of alternatives from this point can be used as a measure of entropy to calculate attention levels of criterion. This is because when alternatives are performing close to each other in a criterion, the decision-making (DM) faces a great deal of uncertainty in determining the extent of satisfaction a specific alternative will provide with respect to the ideal value in that criterion. But if the performance of alternatives is fairly evenly dispersed in a criterion, the decision making faces less uncertainty in determining which alternative will closely satisfy the ideal value in that criterion. Thus, the context-dependent weight can determine the level of uncertainty in this regard. This means that if more is the uncertainty, lesser will be the weight. Using the ratings defined by the respondent, the context-dependent attention levels for each criterion are computed with the help of the Attribute Dynamic Attitude Model (ADAM). The mean and standard deviation of relative attention levels for all four criteria which are computed using the ratings defined by the respondents is provided in Table 9. The mean and standard deviation of context-independent relative importance (defined

Table 8 Sample Ratings as Defined by One of the Respondents

Profile ID	Knowledge		Rating	Personal Characteristics		Rating	Skills		Rating	Self-Management		Rating
	Product Knowledge	Competition Knowledge		Attitude	Initiative		Selling Skills	Communication Skills		Planning ability	Judgment & Decision Making Ability	
2	G	F	25	P	VP	-75	VG	VP	25	VG	VG	100
4	VG	VP	0	P	F	-25	G	VP	10	G	G	50
6	VG	F	50	VG	VG	100	VP	VP	-100	F	P	-30
11	P	VP	-25	F	P	0	VG	F	75	F	G	25
13	G	VG	45	VG	P	50	P	P	-75	VP	G	-60
14	VG	G	75	G	P	30	P	P	-75	VP	VG	-50
16	VP	VP	-100	VG	F	75	P	VG	40	VG	P	-25
17	P	VG	-10	P	P	-50	VP	G	-40	VG	F	40
18	P	VP	-50	VG	VP	10	F	G	50	P	VG	0
20	VP	P	-75	P	G	25	P	VG	40	F	VG	75

Note: VP: Very Poor, P: Poor, F: Fair, G: Good, VG: Very Good.

**Table 9 Mean and SD of Relative Attention Levels of Various Criteria**

	Knowledge	Personal Characteristics	Skills	Self-Management
Mean Relative Importance of Criteria weight defined directly by the respondent (Context Independent)	0.207	0.292	0.277	0.223
Rank	4	1	2	3
Mean Relative Attention Levels computed using the ratings (Context Dependent)	0.325	0.197	0.229	0.249
Rank	1	4	3	2
SD of Relative Importance of Criteria weight defined directly by the respondent (Context Independent)	0.096	0.11	0.11	0.1
SD of Relative Attention Levels computed using the ratings (Context Dependent)	0.174	0.11	0.121	0.153

**The rank order of context-dependent and context-independent relative importance of the four criteria are exactly the opposite.**

directly by the respondent) is also provided in Table 9. As expected, the rank order of context-dependent and context-independent relative importance of the four criteria are exactly the opposite. This means that if the respondent has given high relative importance (context-independent) to a criterion, he must have screened only those top 10 profiles which are equally and/or fairly good in this most important criterion. Therefore, the scatter (performance and ultimately the ratings) of profiles in this most important criterion will be less than any other criterion which is less important for the respondent. Contrary to the less important criterion, the respondent might not have paid much

attention, and the dispersion of profiles on any such less important criterion is going to be comparatively higher which is what is reported in the analysis of ratings defined by all the respondents (Table 9). This strengthens the finding that Personal characteristics (Attitude, Initiatives) is the most important criterion for the salespeople performance evaluation followed by Skills (Selling Skills, Communication Skills), Self-Management (Planning Ability, Judgment, and Decision-Making Ability) and Knowledge (Product Knowledge, Competition Knowledge).

### Conclusion

The performance appraisal of salespeople is one of the most difficult tasks faced by sales and marketing managers. The outcome of this research can help in understanding important criteria useful for the performance evaluation of salespeople in India. The com-

pilation of literature on the usage of important performance evaluation-related criteria provides a comprehensive list of important criteria that can be considered for salespeople's performance evaluation. The response collected from 90 sales and marketing managers from various organizations indicates that the top four criteria viz. 1. Knowledge (Product Knowledge and Competition Knowledge) 2. Personal Characteristics (Attitude and Initiatives) 3. Skills (Selling skills and Communication skills) and 4. Self-management (Judgement/Decision-making ability and planning ability) are not equally important for salespeople performance evaluation. This is further confirmed by analyzing the preference ratings collected from these managers on hypothetical profiles of salespeople. Personal Characteristics and Skills received higher mean weightage than Knowledge and Self-Management. Later rounds of interactions with the managers concluded that training can be imparted to salespeople to improve their knowledge & self-management capabilities, thus receiving low mean weightage. However, personal characteristics & soft skills depend upon an individual's own capabilities and efforts, thus receiving higher mean weightage.

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