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The evolution of the seven steps of selling

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Abstract

The traditional seven steps of selling is perhaps the oldest paradigm in the sales discipline. The seven steps model has served as a basic framework in sales training, personal selling textbooks, and teaching personal selling classes. Very little has changed in this framework since the turn of the 20th century. This article reviews the traditional seven steps of selling, examines transformative factors that have led to changes in each step, and presents an evolved seven steps process. While the traditional seven steps reflected a selling orientation on the part of a firm, the evolved selling process reflects more of a customer orientation in that the focus is on *relationship selling*—that is, securing, building, and maintaining long-term relationships with profitable customers.

Keywords: Selling; Selling activities; Selling function; Selling process; Selling steps

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1. Introduction

The profession of selling has a rich history that traces its roots back to the ancient world, gained prominence in the early 20th century, and continues to evolve as we move into the beginnings of the 21st century ([Hawes et al., 2004](#), [Powers et al., 1988](#) and [Powers et al., 1987](#)). Review of these historical perspectives reveals distinct differences in the importance of selling to the overall economy and to the development of both the marketing and sales disciplines, particularly in light of changes in economic conditions ([Wotruba, 1991](#)). Business in the 20th century progressed through various eras popularly portrayed as beginning with the production era, followed by the sales era, and the marketing era ([Dawson, 1970](#)). Selling or the philosophy of selling is depicted as different in each of these eras, resulting in changes in the salesperson and the sales discipline through the three evolutionary stages.

Throughout modern selling history, one of the oldest and most widely accepted paradigms in the sales discipline is commonly referred to as the “seven steps of selling” ([Dubinsky, 1980/1981](#)). These seven steps present the typical sales scenario as composed of the following: (1) prospecting, (2) preapproach, (3) approach, (4) presentation, (5) overcoming objections, (6) close, and (7) follow-up. Ever since selling began to be recognized as a professional discipline, the seven steps have served as a foundation in sales training for the process of making a sale, as well as a framework for teaching personal selling classes ([Hawes et al., 2004](#)). Current personal selling textbooks commonly base the organization of the book around some form of these basic steps ([Futrell, 2002](#), [Manning & Reece, 2001](#) and [Weitz et al., 2001](#)).

The seven steps of selling is one of the most widely accepted tenets in the sales field, and

can be found in early sales books and periodicals. For example, a 1920 sales training book titled *How to Increase Your Sales* lists the “six” steps of selling as (1) find the prospect, (2) preapproach, (3) approach, (4) the demonstration, (5) the argument, and (6) the close (*How to Increase Your Sales* 17th ed.). The only traditional selling step not mentioned is the “follow-up,” which is a more recent addition. For at least 80 years, the steps in a selling process have remained virtually the same.

Over time, effective selling methods have evolved from closed, forceful techniques to more of a relationship selling approach ([Schurr, 1987](#)). Relationship selling involves securing, developing, and maintaining long-term relationships with profitable customers ([Johnston & Marshall, 2003](#), p. 5). Several behavioral forces are having a major impact on shifting selling to a more relationship-based approach. Rising customer expectations, consumer avoidance of buyer–seller negotiations, expanding power of giant retailers, globalization, and demassification of domestic markets are radically changing the way salespeople perform their jobs ([Anderson, 1996](#)).

In today's world of selling, world firms focus on the strategic use of the sales organization with an emphasis on the selling mission rather than just maintaining a sales force ([Leigh & Marshall, 2001](#)). The sales organization has a variety of selling methods to employ, the “selling mix.” The mix includes traditional field sales forces but also includes other methods of selling, such as teleselling, national account representatives, part-time sales forces, Internet selling, and selling through the use of partners ([Cardoza & Shipp, 1987](#) and [Marshall et al., 1999](#)).

Technology, a changing customer base, new selling tools, and globalization all have had a major influence on the salesperson of today. Certainly, changes have occurred in the day-to-day job. [Marshall et al. \(1999\)](#) tracked the daily activities of salespeople and compared them to activities collected in 1981 by [Moncrief \(1986\)](#). Their results show that the majority of 1981 activities were still being performed. However, they also found 49 new sales activities, many of which revolve around new philosophies of selling (consultative selling, adaptive selling, value-added selling, relationship selling, etc.). They produced a 10-cell grid depicting these activities based on technology (or nontechnology), which is shown in [Table 1](#). The authors conclude that the sales job has experienced significant job enlargement with an increase of job activities required to support successful performance.

Table 1.

New selling activities

	Communication	Sales	Relationship	Team	Database
Technology	Email, dictaphone, Internet,	Set up appointments, script sales	Web page ^a	Conference calls	Collect new information from database,

	laptops ^a –CD ROM, voice-mail, fax, cellular phone, pager, Web page ^a , newsletters, audio–video conference, provide technical info., overnight services, maintain virtual office	pitch from database, use software for customer background, laptop for presentation ^a , VCR for presentation, provide technology, ability to customer		enter information/data on laptop ^a , update customer files
Nontechnology	Practice language skills	Adaptive selling, conduct research at customer's business, avoid potential litigation, plan for multiple calls to close deal, sell value-added services, respond to referrals, write thank-yous ^a , target key accounts, pick up sales supplies, consultative selling, listen, ask questions, read body language, sell unique competencies	Bring in vendor/alliance, develop relationship, hand-hold customer, write thank-yous ^a , purchase dealers, call on CEOs, build rapport with buying center, network, build trust, train brokers	Mentor, make sale and turn it over to someone else, coordinate with sales support

Source: [Marshall et al. \(1999\)](#). ^a Appears in more than one cell.

The above evidence is compelling that the field of selling has evolved over the past century, with particularly high impact changes in the most recent decade (for an enlightening assessment of selling as a profession, see [Hawes et al., 2004](#)). Concurrently, sales organizations have changed and continue to evolve. And of course, the salesperson him-/herself has also changed over time, including increased diversity and globalization in general. Today's professional sales force is better educated with most having a college degree and many having graduate degrees. New philosophies of selling dominate, with emphasis on relationships. Given such dramatic evolution in the sales field, it is odd that, if the sales textbooks represent reality, one tenet that gives the appearance outwardly of having changed little is the seven steps of selling. In fact, the steps are still widely cited in textbooks and form the basis for much sales training. However, is the anchoring of selling as a discipline on the seven steps model still appropriate? We argue that various transformative factors have impacted the steps in recent years, and present an evolved selling process that better reflects practice today.

2. Traditional seven steps of selling

This section briefly reviews the historical seven steps of selling and some of the topical discussion of each selling step that one might find in most any sales textbook.

2.1. Prospecting

Prospecting is the method by which salespeople search for new customers and potential customers. One obvious reason for prospecting is to expand the customer base, which is important because most sales organizations lose customers every year ([Jolson & Wotruba, 1992](#)). Sales textbooks typically discuss methods of prospecting, such as referrals, networking, bird-dogging, cold canvassing, and numerous others. Prospecting usually includes a discussion of qualifying the prospect and thus developing some type of screening procedure.

Traditionally, salespeople were expected to find their own prospects. Prospecting was an essential and large part of the selling job, and for many salespeople, this was the most difficult and tedious part of the job—in fact, it is an aspect of sales jobs that has chased off many would-be salespeople.

2.2. Preapproach

The preapproach step includes all postprospecting activities prior to the actual visit with a prospect or customer. The preapproach step occurs on virtually every sales call. Sellers are doing their research on the prospect or customer, familiarizing themselves with the customer's needs, reviewing previous correspondence, and pulling together any other new and relevant material that might be appropriate for bringing to the sales call itself. Preapproach activities also include talking with gatekeepers, doing homework on the

customer (individual and organization), mentally preparing for the approach and presentation (rehearsal), and “reading” the customer's office on entry.

2.3. Approach

The approach usually takes the first minute or minutes of a sale. It consists of the strategies and tactics employed by salespeople when gaining an audience and establishing initial rapport with the customer. The approach includes opening small talk, the handshake, eye contact, and generally making a good initial impression. Most sales textbooks include a variety of different approaches that can be used, including the introductory approach, the assessment approach, the product approach, the consumer-benefit approach, the referral approach, the consultative approach, and many others.

2.4. Presentation

The presentation is the main body of the sales call and should occur after the salesperson has predetermined the needs of the customer. This step can be one presentation or multiple presentations over a period of time. Goals for the sales presentation will vary. First-time buyers must get sufficient information to adequately understand the product's benefits, which may be facilitated by building the presentation around a product demonstration. Selling points and attributes are visualized and built around a call agenda or sales proposal. This step can be complex, and preparation is essential. Sales textbooks and sales training programs spend substantial time on this step of the selling process.

2.5. Overcoming objections

Objections can be broadly defined as customer questions and hesitations about the product or company. Salespeople should expect that objections will be encountered in every sales presentation. A number of reasons exist for objections, and despite the fact that objections can delay the sales process, for the most part they should be perceived in a positive sense as useful. This is because by revealing objections, true buyer needs can be uncovered. In the early days of selling, sales objections were viewed mostly as a hurdle that salespeople had to overcome to get to the ultimate sale. In more modern times, a true objection might be viewed as a sign not to pursue the sale further because a need may not be met with a given product. Most sales textbooks provide a discussion of differing types of objections and procedures for how the salesperson can overcome them.

2.6. Close

The close is defined as the successful completion of the sales presentation culminating in a commitment to buy the good or service. Once any objections have been successfully overcome, the salesperson must actually ask for the business and thus begin the process of closing the sale. This step traditionally has been trumpeted as difficult for many salespeople (especially new salespeople) because many simply do not ask for the order. A

myriad of closing tactics are available, some of which are quite colorful, that are typically discussed in sales textbooks and sales training sessions.

2.7. Follow-up

As mentioned earlier, the follow-up step is a relatively newer addition to the steps of selling in which the salesperson does not assume the sale is over with the acceptance of an order. Rather, much work begins after the sale to make sure the customer is happy with the product/service and that everything that was promised is being delivered. Examples that are frequently given include a thank-you letter to the customer or a follow-up phone call to ensure the customer is happy.

3. Transformative factors impacting the selling process

In the last two decades, the seven steps of selling have begun to evolve based on the influence of a variety of transformative factors, including technology, the expanding strategic role of selling within organizations, team-based approaches to selling, increased buyer knowledge and sophistication, and others. These key transformative factors have proven to be catalysts in moving the traditional seven steps to an evolved selling process. That is, sales organizations and salespeople have moved beyond mere application of sequential traditional selling steps to a process that is largely nonsequential. The evolution is still underway, and many of today's sales organizations are in various stages of the evolution toward a selling process that will be discussed in the next section. [Table 2](#) presents the traditional seven steps of selling, key transformative factors impacting the selling steps, and the evolved selling process that today has replaced more traditional approaches in many sales organizations that are seeking long-term relationships with their customers.

Table 2.

The evolution of the seven steps of selling

Traditional seven steps of selling	Transformative factors	Evolved selling process
(1) Prospecting	Telemarketing	(1) Customer retention and deletion
(2) Preapproach	Internet selling Organizational prospecting Laptop account data	(2) Database and knowledge management
(3) Approach	Support staff Build a foundation	(3) Nurturing the relationship (relationship selling)
(4) Presentation	PowerPoint/multimedia Listening	(4) Marketing the product

	Team selling	
	Multiple calls	
	Value-added	
	Buying centers	
(5) Overcoming objections	Predetermining needs	(5) Problem solving
(6) Close	Identifying mutual goals	(6) Adding value/satisfying needs
(7) Follow-up	Increased effectiveness of communication through technology	(7) Customer relationship maintenance

3.1. Transformation of the prospecting step

Based on 1981 data, [Moncrief \(1986\)](#) found that different sales jobs require different frequencies of sales activities, including prospecting. Now, well over 20 years later, the prospecting step is not necessarily performed by a salesperson at all. In fact, much of what constitutes prospecting is now being conducted by others in the organization, and in many cases, the salesperson has little or no direct responsibility for prospecting. Traditional prospecting is an expensive procedure because it takes multiple calls to provide one person who may or may not become a bona-fide prospect. Salespeople are very expensive assets for an organization and many organizations believe that a salesperson's time is better spent with current customers or making a call on a qualified prospect that someone else has identified.

Many sales organizations today are using telemarketers to (in effect) perform the prospecting function. Once the prospect is found, the telemarketer may attempt a sale or may pass the lead to the appropriate salesperson depending on the structure of the organization. The Internet has also allowed potential prospects to approach the organization, where they are later contacted by a salesperson. Technology has allowed the organization to become more cost efficient and effective in the prospecting step, freeing the salesperson to focus on other sales functions. Especially, database marketing and CRM have enhanced marketing's ability to aid salespeople in prospecting. As a result, the current evolution for prospecting is that salespeople may no longer be performing the prospecting step as a systematic part of their job, but the step typically remains elsewhere within the organization.

3.2. Transformation of the preapproach step

The traditional preapproach might consist of a salesperson sitting in his/her car reviewing notes on a 3x5 index card about the upcoming sales call. A 1921 sales manual states, "...a card is written for each of these firms; on it, in addition to their office address, is placed their rating, the line of business in which they are engaged, the names of their officers, ...any personal information regarding any or all of these men (SIC) is also obtained" (*How to Increase Your Sales*, 17th ed., pp.15–20).

Today, a laptop computer loaded with customer data instantly makes a salesperson highly customer knowledgeable. They have the customer records at hand, their buying history, and any personal information they might need. Well-executed CRM systems are adept at providing the means to update any aspect of this customer information at any customer touchpoint (places where customers come in contact with the selling firm). In short, they are the best informed of any sales generation in history. Today's salesperson often calls on multiple people (buying center members) within a firm rather than one traditional purchasing agent, and the salesperson can have as much information at hand (electronically) as can be collected. Bottom line: no longer is the preapproach an individual activity—it is now an activity that the home office and staff can help facilitate for the salesperson. Preapproach functions are still being conducted, but the amount and quality of information is substantially improved over prior years. Technology (including the cell phone, virtual offices, Internet, pagers, and laptops) has greatly facilitated the preapproach step at the salesperson level.

3.3. Transformation of the approach step

The traditional approach is based on what tactics the salesperson would employ once he/she was in front of the customer or potential customer. A shift has occurred to a broader relationship approach where the salesperson likely has already developed the foundation of an interpersonal network within the buying organization and the goal is to provide more information or solve some existing problem—that is, provide a solution. Obviously, this approach is easier if a relationship already exists. However, in the situations of a new buy, the approach still should be foundation based, determining the organizational structure, needs, problems, and issues. Because most sales do not occur on the first call but rather are a result of multiple calls and contacts with multiple people, establishing and building on this foundation is what eventually facilitates relationship selling.

3.4. Transformation of the presentation step

One of the early presentation styles developed by National Cash Register was the “canned presentation” in which a script was provided and all salespeople were trained to follow the same basic sales pitch. The advantage was consistency among the salespeople, while the obvious disadvantage was a lack of flexibility and adaptability. Traditional presentations consist of a one-on-one buyer–seller meeting in which the salesperson provides arguments for the advantages and attributes of his/her products through presentational systems, such as features-advantages-benefits (F-A-B). The typical presentation might be five minutes or up to an hour.

For many salespeople, the presentation step has undergone a substantial transformation. [Marshall et al. \(1999\)](#) found that numerous new sales activities exist related to the presentation, including activities such as adaptive selling, consultative selling, and value-added selling. Today's presentations typically are conducted over several meetings, with the salesperson often doing more listening than talking ([Castleberry & Shepherd, 1993](#)

and [Comer & Drollinger, 1999](#)). This is a quite different approach from the canned (or semicanned) presentation. Today's salesperson must be prepared to make several sales calls to discover the needs of the customer base prior to attempting a sale.

The physical presentation has also undergone a transformation, spurred on by several factors. First, salespeople can now use a PowerPoint-type presentation that can be easily adapted from call to call. Second, with the use of a laptop computer, a salesperson can provide much more depth of knowledge that is targeted to a specific customer. A third major transformative factor is the fact that today's presentations often are delivered by a team from the selling organization, rather than via the traditional approach of individual salesperson presentations ([Deeter-Schmelz & Ramsey, 1995](#), [Moon & Armstrong, 1994](#), [Moon & Gupta, 1997](#) and [Perry et al., 1999](#)). Finally, as mentioned earlier, more and more sales presentations are made to a buying center, probably including firm executives, as opposed to a single purchasing agent. This transformative factor greatly impedes the style and content of the presentation compared to the traditional way of presenting to one purchasing agent.

3.5. Transformation of the overcoming objections step

In this step, the traditional salesperson attempts to overcome any reason the customer might have for not buying the product and move the customer to the close. Today's salesperson through either predetermined needs or multiple calls is attempting to ascertain earlier and more precisely what the customer requires from the product. Listening and asking questions become key elements of the transformation of the overcoming objections step. A survey of 215 sales managers from a variety of industries found listening skills is the single most important attribute sought in new sales recruits ([Marshall, Goebel, & Moncrief, 2003](#)). Although any salesperson wants the successful completion of a sale, when making multiple calls on a customer the goal in each call is not necessarily a classic close. Thus overcoming objections is not necessarily the ultimate goal of this step.

3.6. Transformation of the close step

The traditional close implied that the salesperson had asked for the order and the customer had either agreed to purchase or had declined. As such, the goal of most traditional sales calls was the “order”—the “completion” of the sale. In terms of transformation, the key goal of this step has moved beyond simply short-term physical closure to the successful realization of the mutual goals of both parties to the relationship, over the long run. Of course, in many cases, this indeed might include a traditional “closed” sale, but with most customers the relevant closure is the level of success in achieving whatever the stated mutual goals are at this point in the relationship, whatever level of scope and content those goals may represent.

Firms today focus on lifetime value of a customer. The goals to be achieved between seller and buyer must be mutually beneficial. Developing a long-term relationship with

customers whose ROI is negative is bad business.

3.7. Transformation of the follow-up step

The traditional follow-up was typically done with a phone call or letter thanking the customer for the sale and determining if the product was meeting expectations. Frequently, the salesperson would “drop by” to see if any problems were occurring. The key transformative factor here is increased effectiveness of communication through technology. Today, email has become a dominant method of follow-up because of its ease of use and timeliness. The salesperson can literally go back to the office (real or virtual) and send a quick message that the customer will receive immediately rather than two or three days later. Although the phone is also quick, it is becoming more difficult to actually get through to the required person. Emails are quick and efficient and also allow the customer to quickly respond to the salesperson if difficulties arise. In the era of relationship selling, the follow-up step has gained importance and is also now much quicker and more efficient to execute.

4. Evolved selling process

Although not all sales organizations are involved equally in all components of the evolved selling process presented in this section, as the impact of transformative factors discussed in the prior section grows, more of the processes discussed in this section will begin to occur. These evolved “seven steps,” which importantly unlike the traditional seven steps are not sequential, are a natural progression from the past based on the way business is conducted between sellers and customers today. That is, most modern sales organizations, and certainly the vast majority of the Fortune 500 firms, have moved beyond the traditional seven steps of selling. And although the traditional seven steps has been a pervasive and convenient paradigm for representing the sales function, we are clear that for many (most) firms, it is yesterday's paradigm.

Supporting this, [Marshall et al. \(1999\)](#) report from their focus groups of salespeople across multiple industries that substantial differences were found in the degree of “modernization” among the sales forces represented. Many of the salespeople were heavily technology oriented while others were basically conducting business as they always had. Some reported numerous changes in sales approaches, with the changes accelerating; others were surprised at these new changes being reported and claimed that little sales innovation was occurring in their industry.

Not every industry finds selling evolving at the same rate, but it is inevitable that the selling process ultimately will evolve or else it will become ineffective in the quest for business success and survival ([Wotruba, 1991](#)). This concept of an evolutionary pattern can be compared to Darwin's theory of natural selection, whereby the species (organizations) that adapt to the changes in the environment survive, and those that do not adapt cease to exist ([Henderson, 1983](#), [Lampkin & Day, 1989](#) and [Wotruba, 1991](#)).

The steps in the traditional seven step selling process are sequential and cumulative in that a salesperson starts with prospecting and works his/her way through to follow-up. The amount of time or effort in any one step may vary but the traditional model requires that every step occur.

In contrast, the evolved selling process assumes that the salesperson typically will perform the various steps of the process in some form, but that the steps do not necessarily occur for each sales call. Rather, they occur over time, accomplished by multiple people within the selling firm, and not necessarily in any given sequence. They represent various aspects of sales strategy that have replaced the traditional steps. In fact, overreliance on the traditional seven steps today may be counterproductive for many sales organizations. This is because, taken in sum, the traditional steps have a distinct lack of customer orientation. The traditional steps represent more of a sales orientation rather than an orientation toward or building customer relationships ([Dawson, 1970](#)). Ultimately, they imply a simplicity and degree of certainty to the sales process that is deceptively seductive and thus potentially dangerous to progress toward building relationships.

The evolved steps are as follows: (1) customer retention and deletion, (2) database and knowledge management, (3) nurturing the relationship (relationship selling), (4) marketing the product, (5) problem solving (also known as consultative or solution selling), (6) adding value/satisfying needs, and (7) customer relationship maintenance. These evolved steps flow directly from the transformative factors for each step as depicted in [Table 2](#) and described in the prior section. Because in the transformation sales jobs have broadened substantially (evidenced by the many new activities depicted in [Table 1](#)), these evolved steps have emerged to support that broadened role. As emphasized in the prior section, the sales role in many firms is now a shared role between salespeople and other firm members.

[Fig. 1](#) provides a pictorial representation of the evolved selling process, with the center or focus of the execution of each step being the customer. Substantial evidence exists that customer-oriented selling drives firm success today ([Schwepker, 2003](#)).

Fig. 1. Evolved selling process.

The following discussion introduces each evolved step and describes how it flows from the original seven steps through the transformative factors.

4.1. Customer retention and deletion versus prospecting

In today's business environment, organizations are finding the old 80:20 rule to be even

more of a reality. Eighty percent of the business is coming from 20% of the customers (or in many cases, an even more skewed ratio). Rather than focusing mainly on prospecting for new customers, sales organizations are spending more resources to retain existing profitable, high potential customers. When a customer is strategically important to the welfare of the whole selling organization, it deserves more resources from that organization ([Sengupta et al., 2000](#)). Time spent with successful established clients has a positive impact on performance, often more so than calling on potential customers ([Weeks & Kahle, 1990](#)).

Today, resources are being diverted to provide more service and value-adding assets to key customers. The salesperson(s) assigned to the customer may spend the majority or all of his/her time on the one customer or at a minimum, a few key customers. Sales organizations are finding that the typical “C” account (small customer) can actually cost the organization money. Customer Relationship Management (CRM) programs talk of “firing” customers that show poor long-term potential for return on customer investment ([Reichheld, 2001](#)). Often these “C” accounts may be deleted as customers, or outsourced to other companies. An outsourced account is still considered to be a customer of the firm, but for them, selling and related activities are performed by other companies—typically smaller and more specialized sales firms. The parent organization may not want the negative publicity of giving up customers, particularly long-term customers, but neither can they afford to invest resources in nonperforming customers. As organizations go through mergers, global expansion, and downsizing the level of customer attention also shifts with some customers getting more emphasis and many (most) getting much less attention.

For modern sales organizations, this evolved step is the antithesis of the traditional prospecting step. Instead of attempting to acquire as many new customers as possible, the firm assesses the lifetime value of existing customers and acquires new customers only when the benefits outweigh the costs of doing business ([Reichheld, 2001](#)). Today, many salespeople are not spending much time prospecting, but instead have shifted focus to retaining their best customers.

4.2. Database and knowledge management versus preapproach

Much of marketing and sales strategy today revolves around the construction, maintenance, and use of database marketing ([Swift, 2001](#)). This is the cyber version of the old preapproach, because today's the organization has broad customer knowledge, including a complete history of purchasing, past and present needs, and even the anticipation of what would benefit the customer in the future. Organizations are spending substantial money and resources building databases that will allow the firm to better serve the customer base. Salespeople are expected to contribute knowledge to the database, and in return they also gain broad customer knowledge.

This capability for enhanced knowledge management has been facilitated in part by the increased availability and use of technology by salespeople. In comparing sales activities

from the mid-1980s to today, 25 substantive new uses of technology in selling were identified (see [Table 1](#)). Whereas in the traditional preapproach the salesperson largely worked the phones and perused hard copy customer records to prepare for the call, today sales organizations often provide extensive in-house assistance with customer research, and the knowledge management systems at the salesperson's disposal are extensive. No question: database and knowledge management have made selling more professional and made salespeople more relevant to their customers' businesses.

4.3. Nurturing the relationship (relationship selling) versus approach

Implementing relationship selling requires the selling activities be directed toward building partnerships with key customers ([Johnston & Marshall, 2003](#)). This method may require salespeople and sales organizations to change much of the way they perform the selling function and the way they reward their salespeople ([Leigh & Marshall, 2001](#)). Relationship selling requires that the sales force focus on the long term and not simply focus on closing the next sale ([Beverland, 2001](#)), a contrast to much of the history of selling. A long-term, customer-oriented focus places important new responsibilities on the sales organization. The conduct, activities, and behavior of the salesperson personify how the organization regards its customer base. Therefore, in many respects, the success of the firm as a whole depends on the success of the salesperson ([Williams & Attaway, 1996](#)).

In the traditional seven steps, the approach step was about finding the best way to open a dialogue with the customer or potential customer. The key transformative factors for this step focused on building a foundation to serve as a springboard to relationship selling. In the more evolved selling process, the goal is not to decide what approach method might be best; rather, it is to provide the best long-term customer service, a shift in focus that can only occur if relationships are already established. Organizations are now experimenting with a variety of methods to enhance the relationships with their suppliers and customer base ([Cannon & Perreault, 1999](#)). Within this modern paradigm, the traditional “approach” step is relatively inconsequential because the relationship must already be in development.

4.4. Marketing the product versus presentation

The traditional role of the salesperson in this step of selling was to plan and physically make a presentation to the customer, typically in a one-on-one interaction. The relevant transformative factors consist of buying and selling teams, a variety of different philosophical approaches to selling, and multiple sales calls to reach a decision. These factors have led to an evolved selling process in which salespeople have become more engaged in marketing ([Leigh & Marshall, 2001](#)). One of the issues facing sales and marketing organizations today is the degree of separation or inclusion between the marketing and sales functions. Sales personnel are becoming more involved in functions that traditionally have been under marketing's purview ([Cespedes, 1995](#)). The role of the salesperson is expanding to participate in strategic marketing activities, such as market

segmentation, product development, market development, and diversification as well as traditional sales activities that complement or support marketing activities (e.g., database management, providing and analyzing market information, hiring and training, and assessing market segments; [Leigh & Marshall, 2001](#)).

In the evolved selling process, salespeople still make presentations, but a presentation is not necessarily the primary function of the sales call. Much of the information that can be gleaned by a customer from a presentation is now being delivered through Web pages, national advertising, and continual updates of materials from the selling firm. An email today with attachments can give the customer up-to-date information on many issues in a quicker, more comprehensive, and more time-convenient manner than most face-to-face interactions.

Salespeople within the evolved selling process are still conduits of information within the selling firm, just as they are conduits of information to the customer base. The difference from the traditional presentation step lies in the methods of delivery and the emphasis on conducting more of the marketing function at the salesperson level.

4.5. Problem solving versus overcoming objections

The goal of the traditional step of overcoming objections is to uncover the true reason(s) why the customer was hesitating to close the sale. Reasons may include a lack of information, a dislike for the person, product, or price, or an unwillingness to make a decision. Traditionally, the goal of the salesperson has been to satisfy the customer regarding their objections.

The key transformative factor in overcoming objections is the shift to predetermining many of the needs of customers, allowing for an evolved process of selling focused (in many customer relationships) on problem solving via the implementation of a consultative selling approach. In consultative selling, also referred to as “solution selling” or “selling solutions,” the salesperson is not focusing so much on overcoming objections but rather on serving as a “consultant” to work with the customer to identify problems, determine needs, and propose and implement effective solutions ([Bosworth, 1995](#) and [Rackham and De Vincentis, 1999](#)). Many times, this will mean that the product originally proposed turns out to be inappropriate and/or that work needs to be done via product modifications.

The philosophy underlying consultative selling is fundamentally different from that of merely overcoming objections. The goal is not necessarily an immediate sale but rather the enhancement of the relationship based on win-win solutions. Fundamentally, in the evolved selling process, the mind-set of a salesperson should be that of a valued partner with his/her customers, and the feeling should be mutual. To the degree this is in place, overcoming objections becomes moot ([Bosworth, 1995](#)).

4.6. Adding value/satisfying needs versus close

Need satisfaction is a key goal of the evolved selling process. This may mean multiple sales calls to “close” one deal. Or it may mean providing totally new solutions to a customer's problems. Overall, the sales organization (and salesperson) must add value to the customer's enterprise. This realization provides additional impetus for sales and marketing becoming more closely aligned within a firm. A customer need that is satisfied efficiently and effectively through value-added selling means continual business (repeat purchase), and hopefully customer loyalty ([Rackham & DeVincentis, 1999](#)).

The key transformative factor that has led to this change from traditional emphasis on “closing the sale” is the identification of mutual goals between the seller and customer. Throughout the evolved selling process, the seller and customer are actually working in tandem toward mutual success. In this atmosphere, the “close” is often quite anticlimactic—almost an afterthought as both parties gear up for their next consultative encounter. Win-win relationships built on customer satisfaction and added value do not require a closing technique to bring the parties together in agreement.

4.7. Customer relationship maintenance versus follow-up

As mentioned in the earlier section on transformation of the follow-up step, this traditional selling step is probably the most similar to its counterpart in the evolved selling process. The change is owed primarily to increased efficiency and effectiveness of communication through technology. Follow-up has typically implied that the salesperson sent letters of thanks for the business or made an occasional phone call or visit to determine if the product was still working well for the customer. Customer relationship maintenance implies that the selling firm has assigned, on an ongoing basis, an individual or a team to truly maintain all aspects of the business relationship. This may be the salesperson him-/herself, or it may be turned over to others. This approach to follow-up, in turn, implies continual service, even more consultative sales calls, and generally more of a business-building approach versus a postsale problem-handling focus. Sales organizations are currently altering their control and reward systems to account for this shift toward a more ongoing customer relationship maintenance approach to doing business ([Ingram et al., 2002](#)).

5. Conclusion

For nearly a century, the traditional seven steps of selling process (or a similar approach) has been a foundation of the sales discipline. Salespeople that received basic sales training were almost always taught to sell by following the traditional seven steps format. Even today, most personal selling textbooks still build their pedagogical framework around this paradigm. However, selling as a profession and a function has evolved and dramatically changed over recent decades as has been evidenced through the focus of recent sales literature on customer relationships.

Most industries and sales organizations that focus on repeat sales have shifted to an organizational selling framework that relies on more than the traditional one-on-one

salesperson/purchaser interaction. These evolved sales organizations focus on relationships at multiple levels to build and maintain the customer's business. Thus, the process of selling occurs through the work and efforts of multiple people who hold a variety of positions within the firm. As such, the traditional sequential and cumulative seven steps of selling may have lost much of its power as the received view upon which to build training programs and anchor an organization's overall sales philosophy.

This is not to say that the traditional framework is no longer at all relevant. Clearly, industries exist that still rely on the traditional seven steps, but most sales organizations in these industries do not rely primarily on repeat sales. In addition, many salespeople are still active who were trained on the traditional seven steps process and find it difficult to give up this approach (even if their own organization and customers are evolving).

In this article, we have reviewed the seven steps process and presented a set of transformative factors that has led (and will continue to lead) to an evolved nonsequential sales process that reflects a changed organizational philosophy toward selling and customer relationships. The evolved process has occurred primarily because of a shift from a selling orientation to a customer orientation by many firms. This customer orientation requires a differing set of sales strategies. The evolved selling process assumes that the salesperson and/or others within the firm perform steps in the process with the center or focus of execution of each step being the customer. The individual steps do not occur on each sales call. Rather, the steps occur over time and nonsequentially.

With this change, one of the oldest and best known sales paradigms has transformed and evolved into a new 21st century approach, an approach that relies on the premise that the organization as a whole will be focused on securing, developing, and maintaining long-term relationships with profitable customers.

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