



How to Win Friends and Influence Salesperson Retention

A phenomenological study of former salesperson
socialization, compensation, and leader support
at Dale Carnegie (Dallas/Fort Worth)

by

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Vanderbilt University, Spring 2023

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Executive Summary

Dale Carnegie Training is a Global Training and Development Organization. They focus on six core areas: Leadership Training, Presentation Training, Sales Training, Customer Service, People Skills, and Organization Development Solutions. The organization is privately held and is organized into local franchises. The Dallas-Fort Worth branch (DCT-DFW) has experienced significant salesperson turnover over the past 10 years (2012 to 2022). This branch's turnover is significantly higher than the average for the Dale Carnegie organization and sales positions in general. For an organization that trains clients in tactics and skills to reduce employee turnover by increasing employee engagement, having such high attrition in its sales team is unsettling for the owner, and this turnover has had a significant negative impact on the company's financial bottom line. The high turnover in salespeople has hampered the ability of the owner to fully realize his ambitious vision of high growth.

Initial conversations with organization partners suggested that the reason why salespeople left was that they were unable to effectively sell their training solution products in the DFW market. The leadership team at the DFW branch reiterated that macro market conditions, competition, franchise restrictions, inadequate support from national headquarters, compensation, and leadership changes caused sales force turnover. They believed the changes they had already implemented would provide an environment where salespeople could thrive but acknowledged that they had been unsuccessful thus far.

Because our locus of control was the DFW franchise, we focused our attention solely on the internal factors that influenced high salesperson turnover at this branch. As part of this investigation, we surveyed and interviewed former sales employees of this branch from the

period 2012 to 2022. We collected survey responses from 8 (36%) of the former salespeople and conducted interviews with 7 (32%) of former sales employees. We also analyzed relevant documents from the organization and interviewed the owner and his leadership team to fortify our findings.

We leveraged a socialization model to assess former salesperson retention and turnover factors. Socialization is the process by which employees successfully integrate into an organization by learning the necessary social and job skills to meet performance expectations. According to the literature, socialization has been shown to influence salesperson retention and therefore we based our research on a 2003 study that analyzed socialization factors for more than 1,000 sales employees who worked in the same organization for at least two years. We also determined that this study provided a comprehensive framework, enabling us to accurately identify and measure socialization elements that affect retention.

During our extensive literature review, we also found that salesperson compensation and how they're supported by their leader shaped retention. Our framework consists of 1) The socialization framework containing nine variables, 2) Compensation, and 3) Leader Support. We may be the first research team to study socialization by evaluating former sales employees' perceptions, which enabled us to ask turnover-related questions to add more clarity to the socialization process and what may sway retention.

Our study found that certain elements within the socialization framework combined with leader support influenced employees' desire to stay and leave the organization. Sales employees experienced a strong sense of belonging and thoroughly enjoyed the national onboarding training

that they felt made them better people. Many sales employees already had an affection for Dale Carnegie based on prior experience, which challenged the socialization framework and research that claims employees gain affection over time. Leader support, specifically from the branch owner, was the most cited reason for salespeople staying. The owner inspired and coached through his charisma, compassion, and individualized attention. Despite providing exceptional support and striving for growth, he did not establish clear roles, expectations, goals, targets, and motivating compensation plans for his sales force. This led to role ambiguity, stress, and lower performance, which directly led to employees leaving the organization over time.

One of the primary attrition drivers throughout the study was compensation. It's not uncommon for sales employees to believe they should be paid more, but after reviewing employee contracts, performance, and commissions, we were surprised by the results. Very few employees earned commissions, and we found they did not understand how the pay structure worked. The base pay was not competitive compared to market rates in the Dallas area, and we found employees were paid a base or commission, but not both, which was not clearly understood by the sales employees until after they were hired. Interestingly, the owner, who is extremely driven to generate profits, even after 10 years in his role, acknowledged the pay was low, he had control over compensation packages, and according to him, the sales job was not difficult. The sales employees said the opposite in terms of the difficulty of the job. This may explain why the compensation did not seem competitive, but we do not know why the compensation package was not clearly understood until after employees were hired.

Based on our findings, we recommend the owner establish clear roles, goals, and expectations. Our research shows that as salespeople clearly understand these elements, they will

experience less stress and elevated performance. A key element to enhancing role clarity and improving performance is providing a clear and attractive compensation plan. Sales employees must understand how they will be paid and how much they can expect to earn based on accurate historical averages. Salespeople also need to be incentivized to hit and exceed established sales targets through an aggressive commission structure for more experienced salespeople, or a competitive base plus commission structure for less experienced employees. Providing role clarity and an enticing, customized compensation plan will amplify sales employee retention.

We also discovered an unexpected factor that challenged the socialization literature and positively correlated to retention. We found that job candidates who already shared an affection for the Dale Carnegie brand, based on direct or indirect experience, performed better and stayed longer than sales employees who had no emotional connection to the organization. Even sales employees with no sales experience, but who believed in the brand, endured because they identified with the company's mission to strengthen relationships and change lives. Their lives had been positively altered by a Dale Carnegie employee, book, or course before they became employees, which beckoned them to join the cause. We strongly recommend that Dale Carnegie promote salespeople from within or hire those who already have a personal connection to the brand. We're confident that if the DFW branch owner provides role clarity, offers clear and compelling compensation plans, and hires those who have been positively impacted by Dale Carnegie, will raise sales employee retention.

Organizational Context

Dale Carnegie Training (DCT) is highly regarded and is one of the oldest global professional training and development providers. The organization was founded in 1918 by the

author of bestsellers such as *How to Win Friends and Influence People* and *How to Stop Worrying and Start Living*. Its flagship program is called The Dale Carnegie Course (The Dale). This course is targeted toward mid-level professionals interested in moving into leadership positions or employees with leadership potential. The Dale has five overarching objectives: to build greater self-confidence, strengthen people skills, enhance communication skills, develop leadership skills, reduce stress, and improve attitudes. Among the hundreds of famous graduates of this program, Warren Buffet touts his Dale Carnegie experience:

I don't have my diploma from the University of Nebraska hanging on my office wall, and I don't have my diploma from Columbia up there either — but I do have my Dale Carnegie graduation certificate proudly displayed...That \$100 course gave me the most important degree I have. (Segal, 2019)

Dale Carnegie focuses on six core areas: Leadership Training, Presentation Training, Sales Training, Customer Service Training, People Skills, and Organization Development Solutions. It follows a franchise model that the home office, Dale Carnegie & Associates (DC&A), supports and provides resources to local-level franchisees. Certified Dale Carnegie & Associate trainers deliver live and virtual training, but the franchisees deliver mostly live (in-person) training. Each local office is composed of various levels of trainers (part-time, full-time, master trainer, etc.), sales/marketing staff, operations staff, and local franchise leadership. We are partnering with the Dale Carnegie franchise in Dallas/Fort Worth, TX (DCT-DFW).

DFW Franchise

The executive leadership team for the DFW franchise is the main stakeholder in this project. This team includes the regional president (DCT-DFW franchise owner), vice president

of operations, vice president of training, and vice president of sales. The owner purchased the DFW franchise in 2012 and retained most of the core executive team who had been working there previously. In addition to the executive leadership team, trainers and customers also serve as stakeholders. Various employees at the DFW branch and potential clients should be positively impacted by the findings of our work. Nationally, other franchises may be able to apply the findings of our investigation, and the overall brand of Dale Carnegie could benefit from our findings.

On numerous occasions, the owner encountered resistance or faced difficulty gaining buy-in from members of his executive team to implement changes he thought were going to improve the way things were done and grow revenue. Even before the COVID-19 pandemic, the owner struggled to make his vision become a reality and transform the business. He had ambitions to aggressively grow sales and revenue for a branch that remained stagnant in terms of revenue. From 2012 to 2020, the owner was fully hands-on with all aspects of the day-to-day business, but since the additional negative financial impact of COVID-19, he has focused his efforts on new business ventures, and he has become a distant owner. He has handed over all responsibilities to the vice president of operations (head of operations), yet he is still financially responsible for the franchise.

Problem of Practice

This franchise has a high turnover among salespeople on its sales team. During the period between 2012 to 2022, a total of 26 individuals were hired in the sales role, and 18 out of the 26 (69%) salespeople that were hired had left the company in less than 12 months. The average salesperson turnover for Dale Carnegie franchises nationwide is 20%, and the average turnover

for sales employees is 35% (Xactly, 2022). This franchise has had difficulty retaining salespeople on its sales team over the past 10 years.

Salespeople are the lifeline of this business as they bring new participants into training classes. Fees from new participants are the primary driver of revenue growth for this business. In 2015, which was one of the best-performing years for this franchise, the sales team was composed of 10 people. According to the head of operations, to achieve the desired sales volume, there should be at least four salespeople on the team, and currently, in August 2022, there are only two: one sales manager and a part-time employee. The inability to maintain a strong sales team has inhibited revenue growth exacerbated by the pandemic, causing revenues to decline 50% from \$1.35 million pre-pandemic to \$700,000 in 2021. The current net sales of \$750,000 are 81% below owner expectations.

To address the ongoing issue of retention, the franchise has tried various adjustments to its compensation models, organizational structure, leadership, and reporting arrangements over the past 10 years, but none of these efforts have improved this trend. Because the organization prides itself on training others to enhance motivation, engagement, and enthusiasm, leaders do not believe that culture is an issue causing this problem.

Our work is the first of its kind for Dale Carnegie as we collected data directly from individuals who have left the organization both voluntarily and involuntarily. Since no exit interviews were conducted, the leadership team does not know why people have left this franchise. Our findings shed light on what former employees think about their experience with this franchise that potentially led to them leaving. We also assessed and compared their tenure, compensation plans, and performance. We believe that we have helped this organization identify

how to attract and retain sales employees who will enjoy and perform well in their roles. This data, coupled with in-depth interview analysis, has enabled us to create a strong narrative and make solid recommendations for the DFW franchise. Our recommendations may also impact other branches of Dale Carnegie or other sales organizations. Most research tackles how to attract and identify candidates who would succeed or retention efforts after employees are hired, but we feel we have achieved both in our study. This aligns with the original request from our stakeholders, which was to attract, hire, and retain sales employees who will succeed. The literature review has served as the backbone that has guided our research and helped us to determine best practices.

Literature Review

Given the problem described above, we turn our attention in the scholarly literature to areas impacting sales force retention and, more specifically, to factors that correlate with employees' desire to stay or leave an organization. In the literature review that follows, we outline key scholarly research related to the impact of socialization, compensation, and leader support on sales employee retention and turnover.

Sales professionals are the most instrumental employees in an organization, given their impact on revenue (Kane-Sellers, 2007). In their first year, salespeople are more susceptible to quitting, so organizations must understand how to effectively retain new and tenuous talent (Kane-Sellers, 2007). The term "retaining" involves actions designed to engage and develop salespeople throughout their tenure to retain talent. More specifically, the following categories shape salesperson retention: (1) socialization, (2) compensation, 3) and leader support (Barksdale et al., 2003; Kohli, 2001; MacKenzie et al., 2012).



These three components best predict turnover for small sales firms struggling to retain salespeople (Barksdale et al., 2003; Churchill, Ford, Hartley, & Walker, 1985). We will cover each of these categories and demonstrate how they overlap to affect sales force retention.

Socialization



An effective process to attract, develop, and engage salespeople from pre-hiring to termination is known as "socialization." Socialization is "the process by which an individual acquires the social knowledge and skills necessary to assume an organizational role" (Van Maanen & Schein, 1979, as cited in Dubinsky et al., 1986, p. 211). It is an organization's deliberate focus on building relationships and teaching job skills that lead to personal and organizational value alignment, which results in a commitment to stay (Barksdale et al., 2003; Pavlina, 2020). Socialization is even more critical when the job demands more creativity and autonomy (Dubinsky et al., 1986; MacKenzie et al., 2012). What makes socialization an integral part of learning, performance, and retention?

Social Learning Theory

Learning via social interactions is known as "social learning" (Pavlina, 2020; Vygotsky, 1962). Vygotsky (1962) broke ground in social learning research when he discovered that people learn cultural rules, norms, and language through social exchanges. Bandura (1977) built on Vygotsky's work by naming and developing social learning theory, which underscores how people learn through observation, primarily via authority figures. Lave and Wenger (1991) added to social learning theory by studying how newcomers integrate culturally through mentoring relationships.

Lave and Wenger (1991) concentrated on the relationship between new and experienced employees and how newcomers moved from the periphery to become inside contributing members within an organization. Korte and Lin (2013) confirm, "Facilitating interpersonal relations among workers affects how well newcomers integrate into the organization. In addition, relationships have a huge influence on what they can do (performance) and how they feel (satisfaction) toward the organization" (p. 425). Social integration in a work setting has been shown to improve a new employee's long-term success (Asimwe, 2021). Busch and Bush (1978) found that saleswomen experienced less role clarity and had a high turnover because they interacted less with salesmen who were less accepting. Socialization involves engagement and learning via relationships, but it also encompasses specific elements that occur before a salesperson is hired and throughout their tenure.

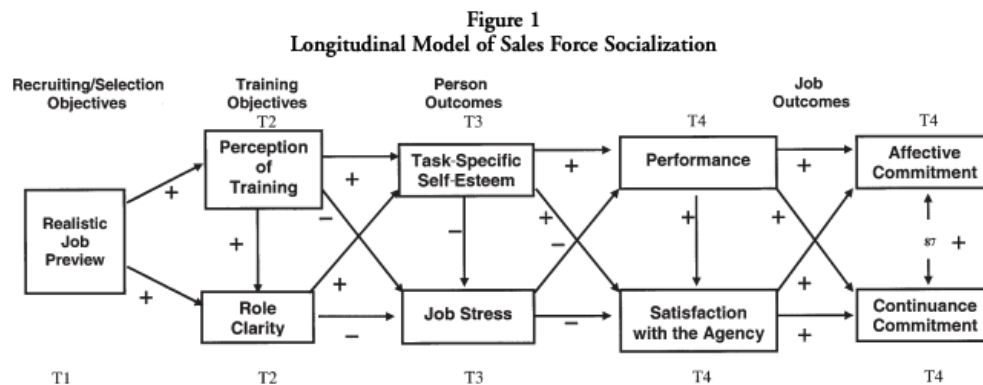
Socialization in the Workplace

The term socialization and focusing on employee assimilation started in the mid-1960s, but Buchanan (1974) was the first to operationalize a socialization model. Feldman (1976) was the first to operationalize pre-entry cognitions, and Dubinsky et al. (1986) built their

socialization framework on Feldman's research but focused their research on sales force socialization. Dubinsky et al. (1986) concentrated their efforts on evaluating sales force socialization for newcomers. Barksdale et al. (2003) based their study on Dubinsky's research by evaluating various stages of sales force socialization, including pre-entry cognitions, but their unit of analysis was salespeople who stayed with an organization for at least two years.

Barksdale Socialization Model

Based on our extensive research, we decided to reference and apply Barksdale et al.'s (2003) socialization framework because it was more comprehensive than other models, and their study focused on sales force retention within a franchise sales model. We also added new elements to Barksdale et al.'s (2003) framework based on our research and results. Unlike Dubinsky et al. (1986), who studied newcomers, and Barksdale et al. (2003), who studied a tenured sales force, our unit of analysis is former sales employees with various levels of tenure. We are the first, as far as we know, to apply a socialization framework to former sales employees. The following is a depiction of Barksdale et al.'s (2003) framework that influenced and guided our research:



Barksdale et al.'s (2003) framework reads left to right, starting with a realistic job preview that accounts for pre-entry cognitions. The model follows the journey of a job candidate to a salesperson surpassing two years' tenure. They studied the insurance sales force and did not include employees who did not persist past the two-year mark, which they determined gave a salesperson time to fully socialize and achieve continuance commitment, a strong desire to stay with an organization. Because our study included people who stayed much longer and less than two years, the Barksdale framework enabled us to determine how tenure and socialization connected and analyze the strength of the relationship between the framework elements that correspond to different stages of socialization and reasons former salespeople left the organization. We needed to understand and assess salespersons' perceptions before they were hired.

Realistic Job Preview. As job candidates learn about their future roles throughout the interview process, they form a realistic job preview (RJP), which can positively or negatively impact retention. A clear RJP outlines what makes a salesperson successful, which plays a critical role in shaping expectations before an employee starts and throughout their tenure (Ahearne et al., 2019; Barksdale et al., 2003). Barksdale et al. (2003) found that RJP had the most impact on sales force retention. Because they influence sales force retention, we need to understand how RJP are formed.

RJP consist of more than a detailed description of tasks and responsibilities; they involve communicating to job candidates what the organization values. Darrat et al. (2021) clarify:

Job previews should be informal, and mission-driven in the sense that organizational values are systematically engrained into interview touch points, to embolden salespeople to ask questions and solicit guidance when confronted with ambiguity... Ultimately, the goal is to create a virtuous cycle of mission-driven salespeople that generate like-minded advocates. (p. 60)

Kickul (2001) claims that focusing on building a clear RJP is one of the cost-effective measures to improve performance and reduce turnover for a small business. RJPs do not just shape expectations; they also help an employee integrate into a new work environment.

RJPs clarify expectations and assist in the socialization process (Darrat et al., 2021). Sharing organizational values during the pre-hiring stage increases organizational commitment through value congruence, which improves retention. Organizations that share their values during the interview process are more likely to attract job candidates who accept and align with the same values and goals, increasing commitment to the organization and improving their sense of belonging (Darrat et al., 2021). However, providing and delivering a clear RJP based on organizational values may not be sufficient to maximize retention.

RJPs and Expectation Lowering Procedures. A newcomer achieves clarity by also sharing their expectations. Tactics to understand a candidate's expectations are known as Expectation Lowering Procedures (ELPs). Baur et al. (2014) found that combining RJPs and ELPs improved retention by enhancing role clarity, which correlates to lower stress and elevated performance. Combining RJPs and ELPs shapes realistic perceptions and attracts candidates who align with the organization's values. Providing clarity, a process known as "realism," sets a job candidate up for success and helps them acclimate as they onboard (Dubinsky et al., 1986).

RJPs' Impact on Role Clarity and Perception of Training. Onboarding consists of the training and development a new hire receives in their first six months (Barksdale et al., 2003). As newcomers onboard, it is imperative that the initial training they receive links job responsibilities and objectives to the RJP (Kane-Sellers, 2007). Barksdale et al. (2003) confirm:

Further, the training provided for new hires must be effective and clearly linked to the tasks necessary to become a top-performing salesperson. If a salesperson receives an accurate RJP and useful training, he or she is more likely to clearly understand the salesperson's role in that industry. (p. 134)

Langdon (1996) warns that unless training connects to job expectations, employees may experience role ambiguity, increasing an employee's propensity to leave. Clear RJPs enhance the perception of training which reinforces the RJP for newcomers and amplifies role clarity (Barksdale et al., 2003; Kane-Sellers, 2007).

We define "role clarity" as "...the extent to which the newcomer is certain about the type of job behaviors required to fulfill the expectations of others" (Menguc et al., 2007, p. 152). When a sales employee lacks role clarity but has an accurate portrayal of the job, they understand the role, but they do not know how to specifically perform or meet expectations. Menguc et al. (2007), who also studied sales force socialization, claim that role clarity is based on feedback, not solely on a newcomer's understanding of the job. Therefore, a supervisor and other leaders within the organization impact role clarity (Barksdale, 2003; Shoemaker, 1999).

Task-Specific Self-Esteem and Job Stress. The more a salesperson has a realistic understanding of their role and how to achieve objectives gained through training and role clarity, the more capable they feel, which lowers job stress (Barksdale, 2003; Kohli, 1985).

Feeling more capable to do a specific task is referred to as "task-specific self-esteem." Bandura (1977) coined this self-efficacy, and Shoemaker (1999) determined that task-specific self-esteem was synonymous with self-efficacy. When sales employee perceives they are capable of meeting role expectations, they're more likely to reach their sales goal and reduce their job stress, another important sales performance antecedent (Barksdale et al., 2003).

Job stress involves worries related to being accepted by the organization and clients, possessing the skills to successfully perform job duties, and meeting supervisor expectations (Barksdale et al., 2003). Salesperson apprehensions and job stress lead to turnover, and salespeople experience more job stress than most employees (Barksdale et al., 2003, Dubinsky et al., 1986). A sales job has more uncertainty, conflict, and delayed results, which leads to more stress and lower performance.

Performance and Satisfaction with the Organization. Menguc et al. (2007) claimed that improved self-esteem/efficacy and being more socially integrated reduces job-related anxiety and empowers the salesperson to set more challenging goals, which improves performance. Performance is simply how an employee achieves job-related tasks. Dubinsky et al. (1986) clarify that salesperson performance is not just confined to sales outcomes; rather, they argue that employee performance pertains to more holistic accomplishments within an organization. For example, Dubinsky et al. (1986) found that supervisor feedback is also a critical component that signals to the salesperson they are meeting performance standards. Certainly, sales performance metrics serve as an important criterion to assess salesperson performance. However, employers should ensure that metrics consider past salesperson performance and seasonality, which means comparing sales performance to similar timeframes

as performance is typically cyclical (Bridges et al., 2007). As sales employees meet performance expectations, they feel more satisfied with the organization.

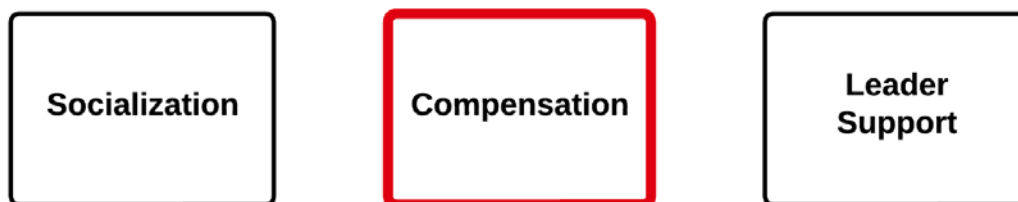
A salesperson feels satisfied with the organization when they are satisfied with their own performance (Barksdale et al., 2003; Dubinsky et al., 1986). Salesperson assessment of their performance and satisfaction is directly linked to organizational leadership and its approval (Barksdale et al., 2003). Rewards and positive feedback from organizational leadership impact job satisfaction, which is the equivalent of satisfaction with the organization as a whole (Dubinsky et al., 1986; Menguc et al., 2007). Dubinsky et al. (1986) found that job satisfaction correlated with role clarity, lower stress, and RJP. As sales employees feel satisfied with the organization, their job, and their performance, they develop an affective commitment, which leads to a commitment to stay.

Affective Commitment and Continuance Commitment. When sales employees feel satisfied with the organization, there is congruence between organizational and individual goals and values that lead to affective commitment (Barksdale et al., 2003; Menguc et al., 2007). "Affective commitment" is "...a strong belief in and acceptance of the organizational goals and values, a willingness to exert considerable effort on behalf of the organization and a strong desire to maintain membership in the organization" (Mowday et al., 1982, as cited in Barksdale et al., 2003, p. 27). Dubinsky et al. (1986) claim that commitment and job involvement are rooted in clear role definitions and inversely correlated to role confusion and conflict. Barksdale et al. (2003) add and admonish that to achieve affective commitment, organizational values should align with performance metrics that are clearly defined and based on behaviors that link to

positive performance. As salespeople experience affective commitment, their desire or commitment to stay with the organization rises.

“Continuance commitment” is “...the outcome of an individual’s decision to remain with an organization because of the personal time and resources already devoted to the company and because of the financial costs of changing jobs” (Commeiras & Fournier, 2001, as cited in Barksdale et al., 2003, p. 239). Barksdale et al. (2003) found that organizational commitment consisted of two types, affective and continuance, and discovered a dearth of research regarding the topic of continuance commitment, also known as calculative commitment, within a sales context. They found that salesperson performance did not directly link to the continuance commitment but did find that satisfaction with the organization directly connected to an RJP, the perception of training, and role clarity. Barksdale et al. (2003) concluded that continuance commitment is indirectly linked to satisfaction with the organization.

Compensation



Employers and salespeople often cite compensation as a culprit for sales employee turnovers, but little evidence suggests compensation is a primary cause for quitting (Kane-Sellers, 2007). Compensation discrepancies typically stem from the expended effort to do the job and the actual pay. The gap between difficulty and compensation gives rise to unmet

expectations that often lead to sales force turnover (Darrat et al., 2021; Lopez et al., 2006).

Organizations must provide realistic expectations of effort to be successful, and the compensation package should match the perceived efforts to achieve sales goals. RJPs directly link to expectations about the reality of the job but also expectations about compensation, especially in a commission-based role (Darrat et al., 2021). Kurdian (2021) connected incentive-based compensation to productivity, satisfaction with the organization, and organizational commitment.

Compensation should be linked to organizational values, which impact affective commitment. For example, companies that value being customer-centric and have long sales cycles may have a larger base pay. On the other hand, an organization that values entrepreneurship may have a 100% commission structure with a high-income ceiling. The pay should reflect the organization's values and be commensurate with the effort needed to achieve performance expectations (Lopez et al., 2006). However, compensation should not be a one-size-fits-all solution.

Salespeople value compensation differently depending on the employee's job demands and career stage (Lopez et al., 2006). Empowering salespeople to choose between commission only, salary plus commission, and straight salary pay increases the chances that they will be satisfied with their compensation (Mitchell, 1974). For a sales force more concentrated on developing and maintaining customer relationships, the compensation should rely on an aggressive commission structure that matches the salesperson's expectations and efforts. Furthermore, depending on the career stage, salespeople value commission structure differently. Fahr et al. (1989) conducted a study that observed how sales employees select a performance-

based compensation plan that consisted of a bonus or commission structure versus a time-based reward plan. Employees with low ability chose the time-based reward plan.

In contrast, those with high ability chose the performance-based plan, supporting the hypothesis that employees who are very skilled at sales may choose to be compensated on a commission-only plan with a higher commission rate. Those with lower self-identified skills may choose a salary plus commission pay plan with a lower commission rate. Similarly, salespeople in the early stages of their careers tend to value a higher base salary than experienced salespeople (Lopez et al., 2006). Older salespeople consider fringe benefits more attractive, such as more time off to tend to family demands (Lopez et al., 2006). Companies should provide a menu of options. Salary-only pay plans do not incentivize salespeople to engage in specific sales behaviors (Churchill et al., 1990) and are not recommended. A motivating compensation plan affects all aspects of the socialization process and should be considered when assessing salesperson retention. Another element that impacts multiple socialization elements is supervisory behaviors, specifically leader support.

Leader Support



Leader support permeates and influences every factor of socialization (Kohli, 1985; Shoemaker, 1999). An employee's satisfaction with the entire organization is often based on their

relationship and perceived support from their direct supervisor (Eisenberger et al., 2002). Studies illustrate how transformational leadership attributes and behaviors increase sales performance (MacKenzie et al., 2012; Shannahan et al., 2013). One study found that the Dale Carnegie leadership training course can substitute for training specifically designed to instill transformational leadership behaviors (Osborne, 2011). Within transformational leadership characteristics is individualized consideration which is the equivalent of supervisor support (Jong & Ford, 2020). Supervisor support has a greater impact on newcomer socialization than other leadership factors, and because DCT-DFW has experienced high turnover among newcomers, we will dive deeper into supervisor support in the literature and assess leader support (Zhang et al., 2014).

A direct manager's behavior impacts a new employee's sense of belonging, which is predicated on feeling supported (Xue, 2018; Zhang et al., 2014). Newcomers attempt to reduce uncertainty, and their supervisor's support provides clarity and connection (Bauer et al., 2007). However, certain manager behaviors influence perceived support more than others. As newcomers onboard, they rely on the behaviors and actions of their leader to gain knowledge and determine if they are successfully integrating (Pavlina, 2020). Xue (2018) clarifies that managers must conduct one-on-ones with new hires in training. Pavlina (2020) adds that inviting a new hire to team meetings increases social integration, leading to supportive relationships, knowledge, and retention.

Supportive leaders improve employee performance, engagement, and retention (Pavlina, 2020). They create inclusivity and involvement for new hires because they feel valued (Gibb, 2003). On the other hand, leaders who do not display support experience more turnover and

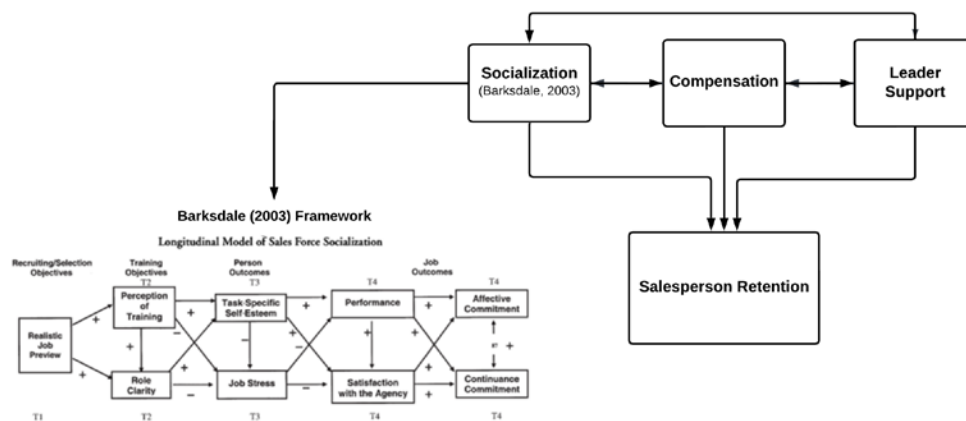
lower performance. Chullen et al. (2011) theorize that according to the laws of reciprocity in relationships, people tend to behave based on how they are treated. If employees perceive neglect or being in the out-group, they revert to deviant behaviors that lead to exiting the company (Chullen et al., 2011). Leaders can offset these negative consequences through supportive leadership behaviors.

Chullen et al. (2011) found that supportive leaders fostered a community environment, which aligns with social learning theories as new employees rely on modeling to shape their behaviors. When new hires do not receive support, they are more inclined to adopt behaviors that focus on self-preservation and have a higher chance of quitting (Chullen et al., 2011). Supportive leaders encourage cohesion among a group and elevate feelings of belonging, which acts as a social adhesive. Supportive leaders also provide training and development, creating a positive feedback loop that reinforces expectations and clarifies roles (Bass & Riggio, 2006).

Conceptual Framework

We draw on Barksdale et al.'s (2003) longitudinal model of sales force retention to conceptualize the key elements related to retention and direct our investigation of DCT-DFW. We selected the Barksdale et al. (2003) framework because they evaluated new salesperson socialization from the pre-hiring stage to two years after they were hired. They studied over 1,000 new sales employees who sold insurance, an intangible product, which is similar to selling training and development products. Additionally, insurance agents have a base pay, commission structure, and book of business. The sales cycle is longer and contingent on building relationships, which also resembled the sales job at Dale Carnegie. Barksdale et al.'s (2003) work evaluated salespeople at different intervals within the first two years of being hired and found

that each element of their framework pertains to certain timeframes that are interconnected. For example, clear expectations before being hired affect job stress and performance within the first year. The framework acknowledges and identifies factors that influence salesperson retention as they transition from job candidate to successful contributor. The majority of sales reps left Dale Carnegie within one year, and Barksdale et al. (2003) concentrated on new sales employees' integration over their first two years. As we study salesperson retention at Dale Carnegie, we can potentially spot weaknesses at certain stages using Barksdale et al.'s (2003) socialization conceptual framework and zero in on areas that may lead to employee turnover with the added elements of compensation and leader support. The following framework illustrates the interconnectedness and how Barksdale et al., (2003) framework when combined with an attractive, customized, and clear compensation plan based on sales experience, and leader support in the form of providing a sense of belonging, offering encouragement, considering individual needs, and helpful coaching, will lead to improved salesperson retention:



The framework offers the most comprehensive view of the pre and post-entry socialization stages. As mentioned in the literature review, compensation impacts a salesperson's desire to stay and can serve as an additional element that affects the socialization process. We argue that

compensation affects multiple elements with Barksdale et al.'s (2003) work that best captures the evolution of integration within a sales organization. In addition to selecting the right compensation package, we found that leader support also impacts multiple factors within Barksdale's framework.

As outlined in the literature review, leader support involves behaviors that foster a culture of belonging that includes involving team members in meetings, conducting one-on-ones, offering encouragement, spending time teaching and coaching, and considering individuals as having different needs, abilities, and aspirations from others. (Bass & Riggio, Chullen et al., 2011; 2006; Xue, 2018; Zhang et al., 2014). It's synonymous with individualized consideration derived from Bass & Riggio's (2006) work on transformational leadership (Jong & Ford, 2020).

Research Questions

Our primary research question centers on the underlying factors that have contributed to salespeople at DCT-DFW staying with or leaving the organization over the past 10 years (2012 to 2022). We leveraged the Barksdale et al. (2003) model and assessed how DCT-DFW socializes new salespeople (RJP, onboarding, training, etc.). As part of our inquiry, we have sought to understand what impact the perceived degree of congruence between the actual demands of the job versus previews/expectations (RJP) had on salesperson retention. We added leader support as an additional area of focus to assess whether it had an impact on salespeople staying or leaving. Lastly, we looked at the relationship between how DCT-DFW compensates its new sales employees and retention.

How do the factors listed below contribute to a salesperson's desire to stay with DCT-DFW?

How do these factors contribute to salespeople leaving the organization?

1. From 2012 to 2022, how did DCT-DFW **socialize** new salespeople? How have these socialization efforts impacted retention and attrition?
2. Do participants perceive a relationship between retention or attrition and how DCT-DFW has **compensated** new sales employees? If so, what is the relationship?
3. In what way do participants perceive a relationship between **leader support** they received and their decision to stay or leave DCT-DFW?

Through our research, we aimed to provide a set of findings that identify some of the underlying factors leading to the high degree of turnover at this branch. We hope that we have identified high-leverage areas for DCT-DFW to tackle and build on to improve retention and, in the end, increase sales and revenue.

Project Design

Data Collection

We drew on surveys, interviews, and a review of documents to answer the project questions above. Successive analysis of transcribed interview data has allowed us to deepen our understanding of preliminary survey findings.

Review of Documents

We reviewed internal human resources documents as a part of our data collection to understand vital demographic information about current and former salespeople, as explained below:

- A review of current and former sales employee resumes provided the level of experience of the sales force to help determine whether individuals with prior sales experience have more realistic job expectations. This ties to the research question: What factors contribute to a salesperson's desire to stay with the organization?
- We also reviewed DCT-DFW's compensation and employment agreement documents to understand the potential impact of compensation on the retention of sales employees. Specifically, we reviewed individual employment agreements, which contained the details of each salesperson's compensation and incentive plan. We compared the incentive plan offered to individual sales performance and length of tenure. According to Lopez et al. (2006), the effect of compensation varies based on sales employees' level of experience. This information helped answer research subquestion two: Do participants perceive a relationship between retention or attrition and how DCT-DFW has compensated new sales employees? If so, what is the relationship?

Survey Data

We sent a survey invitation to all current and former sales employees at DCT-DFW, utilizing the last known email address or phone number on file. The justification for surveying former sales employees instead of just current employees involved the number of respondents. DCT-DFW is a small sales organization, and the sample size (two current sales employees) limited the generalizability of our findings if we only considered current employees. We still surveyed current employees and compared their results to former employees who worked for DCT-DFW in the last 10 years. We selected the 10-year range based on when this organization transferred ownership to the current owner and the accuracy of employee data/records.

Our survey consists of questions taken from Barksdale et al.'s (2003) survey and study with minor adjustments focusing on socialization throughout an entire employee life cycle (see Appendix). Barksdale et al. (2003) studied salesperson expectations within the first 60 days of being hired and six months, one year, and two years after the hire date. They did not include salespeople who left before completing two years in their role, which is a limitation in their study, as many sales employees leave during their initial training (Langdon, 1996). At each stage, they assessed various elements related to the corresponding level of tenure. An important distinction between our study and Barksdale et al.'s (2003) is that we did not assess current employees at different levels of tenure; we evaluated former employees by conducting a retroactive analysis. We wanted to know what factors, based on Barksdale et al.'s (2003) longitudinal model of sales force socialization, which includes RJP, role clarity, perception of training, task-specific self-esteem, job stress, performance, satisfaction with the organization, and affective commitment, had the most impact on attrition, or retention and if it followed a similar sequence of events as outlined by the study. The following are sample statements we asked for related to two of these factors (we included a more expansive list of statements below):

- RJP - *My experience doing the job matched how the job was described to me when I was interviewed.*
- Role Clarity - *My role as a salesperson was clearly explained to me.*

We also examined how supervisor support and compensation impacted retention. Those elements were not included in the Barksdale et al. (2003) model. However, there were two compensation-related questions relevant to Barksdale's RJP element. Throughout the literature

review, we found that these two elements contributed to sales employee turnover and may add value to Barksdale et al.'s (2003) socialization framework.

The survey consisted of 33 questions using five-point Likert scale rankings for 23 of the questions to measure the level of agreement or disagreement with each question, three multiple-choice grid questions to determine the effectiveness of related attributes, and six open-field questions to allow participants the opportunity provide detailed responses in their own words that can be used to extract common themes. The survey included questions that examine an employee's perceptions at the beginning and as they gain more experience with the firm. For example, the first question in the survey asked:

- *Based on your knowledge of the salesperson's role at Dale Carnegie, how accurate was what you were told about your position before starting and during your initial training?*

The survey also included questions that pertain to employees with more sales experience with the firm (one to two years):

- *I really felt as if this company's problems were my own.*

The aim of this project was to identify factors that impacted how long a salesperson stayed in their role. We compared the length of tenure with responses on the surveys and determined if there were significant differences in responses. For example, of those who stay longer than one year, was there a significant difference in responses compared to those who stayed less than six months? We also measured how these factors interconnected or were related. Did higher scores in the perceived quality of training correspond to improved performance or satisfaction with the organization?

The survey assessed job expectations by asking each participant to rate on a five-point Likert scale how much they agreed or disagreed with the following questions that ranged from 1 = strongly disagree; 2 = disagree; 3 = neither agree or disagree; 4 = agree; and 5 = strongly agree:

- *I consider the role as a salesperson at DCT extremely difficult,*
- *The pay matched the degree of difficulty of the job,*
- *My experience doing the job matched how the job was described to me when I interviewed, and*
- *I felt motivated by the pay structure.*

It also assessed role clarity using a five-point Likert scale that ranged from 1 = strongly disagree; 2 = disagree; 3 = neither agree or disagree; 4 = agree; and 5 = strongly agree to understand how much participants agree or disagree with the following statements:

- *I knew exactly what was expected of me,*
- *I had a clear-cut authority to accomplish the tasks required of me,*
- *I knew exactly what my supervisor expected of me, and*
- *My role as a salesperson was clearly explained to me.*

Next, the survey assessed leader support using a five-point Likert scale that ranged from 1 = strongly disagree; 2 = disagree; 3 = neither agree or disagree; 4 = agree; and 5 = strongly agree to understand how much participants agree or disagree with the following statements:

- *I felt my direct supervisor considered my personal feelings before acting,*
- *I felt my direct supervisor showed respect for my personal feelings,*
- *My supervisor took the time often enough to talk about my progress on the job, and*

- *My supervisor frequently checked in to see how I was doing.*

It also assessed relationships using a five-point Likert scale that ranged from 1 = strongly disagree; 2 = disagree; 3 = neither agree or disagree; 4 = agree; and 5 = strongly agree to understand how much participants agree or disagree with the following statements:

- *I felt personally connected to the other employees,*
- *The employees made me feel welcomed when I joined, and*
- *I felt comfortable approaching other employees if I had a question.*

The survey assessed satisfaction with the organization using a five-point Likert scale that ranged from 1 = strongly disagree; 2 = disagree; 3 = neither agree or disagree; 4 = agree; and 5 = strongly agree to understand how much they agreed or disagreed with the following statements:

- *The company did a good job selecting its sales leaders,*
- *The company gave serious consideration to complaints from its sales employees.*

Next, the survey assessed affective commitment using a five-point Likert scale that ranged from 1 = strongly disagree; 2 = disagree; 3 = neither agree or disagree; 4 = agree; and 5 = strongly agree to understand how much they agreed or disagreed with the following statements:

- *I felt like a “part of the family” at this company,*
- *I enjoyed discussing my company with people outside it,*
- *I felt “emotionally attached” to this company,*
- *I would have been very happy to spend the rest of my career with this company,*
- *I really felt as if this company’s problems were my own.*

The next survey question assessed RJP focusing on the accuracy of the employee's experience after accepting the job compared to what they were told before accepting and is "traditionally

assessed through the existence or perceptions of realistic job preview" (Hom et al., 1998; Miceli, 1985; Premack & Wanous, 1985; Wanous, 1973). This was captured in a single question using a five-point Likert scale that ranged from 1 = very inaccurate; 2 = somewhat inaccurate; 3 = neither accurate or inaccurate; 4 = somewhat accurate; and 5 = very accurate:

- *Based on your knowledge of the salesperson's role at DCT-DTW, how accurate was what you were told about your position before starting and during your initial training?*

The survey focused on performance using a multiple-choice grid scale that ranged from 1 = never; 2 = sometimes; 3 often; 4 = quite frequently; to 5 = always to understand how well the salesperson felt about the performance in the following behaviors:

- *Prospecting*
- *Fact-finding needs analysis*
- *Selling/closing*
- *Planning/goal setting*
- *Personal/professional development*

The next question focused on job stress using a multiple-choice grid scale that ranged from 1 = had not thought about this at all; 2 = not at all concerned; 3 = slightly concerned; 4 = moderately concerned; and 5 = extremely concerned, and asked participants to rate how concerned they were with the following statements:

- *Being accepted in the company,*
- *Communication skills,*
- *Acceptance by clients,*
- *Meeting supervisor expectations*

The next question focused on training using a multiple-choice grid scale that ranged from 1 = very poor; 2 = poor; 3 neutral/unsure; 4 = good; to 5 = very good, or 6 = I did not receive training, and asked participants to rate, how they felt about the training they received, if applicable, to the following items:

- *Activity plans and review,*
- *Account preparation and review,*
- *Weekly sales meetings,*
- *Role-playing,*
- *Joint calls,*
- *Selling skills,*
- *Technical systems/tools.*

As mentioned earlier, in addition to the elements of the Barksdale et al. (2003) framework, we added compensation and supervisor support to our conceptual framework because the Barksdale et al. (2003) model did not include these elements. There is ample research that illuminates how compensation plans and supervisor support impact sales force retention (Kane-Sellers, 2007; Lopez et al., 2006). The answers to these questions are captured in the following statements listed in the RJP section of the survey:

- *The pay matched the degree of difficulty of the job.*
- *I felt motivated by the pay structure.*

We hope to have added to the Barksdale et al. (2003) model which does not account for compensation and leader support even though Barksdale et al. (2003) studied more than 1,000 commission-based insurance agents.

Participants in our study received a gift card of up to \$100 in value for their time. The first \$25 was earned by taking the survey, and an additional \$75 was earned once a person participated in a 30-minute interview.

Interview Data

Another data source was one-on-one interviews with current and former sales employees of DCT-DFW who completed the survey. Interviews conducted via video conference served as our primary source of data collection, allowing us to obtain more in-depth responses and information relevant to our project questions with the opportunity to gather specific examples from the participant. According to Ravich and Carl (2021), "The primary goals of qualitative interviews are to gain focused insight into individuals' lived experiences and to understand how participants make sense of and construct reality in relation to the phenomenon" (p. 124). We coded and analyzed each interview to identify common themes that correspond to the research questions and the Barksdale et al. (2003) model. The interviews focused on key information derived from our research questions and our conceptual framework.

Sample. We interviewed the following groups of people listed below and designed questions to better understand contributing factors of salespeople's intent to stay (retention) in their role and leave the organization (attrition). We did not ask questions unrelated to the quantitative survey; rather, the questions were rooted in the Barksdale et al. (2003) model, compensation, and supervisor support to extract more data surrounding employee retention. Specifically, we interviewed former and current sales representatives of the DCT-DFW franchise location who voluntarily agreed to take part in the interview and current sales employees. For example, the interview asked:

- *If you could characterize your experience working for Dale Carnegie in a word, what would it be? Tell me more about that.*
- *How well did your experience working at DC match the expectations you were given at hiring?*
- *How satisfied were you with the compensation, benefits, perks, and incentives that were offered to you? Tell me what impact, if any, this had on your reason for leaving the company.*

We also interviewed the entire DCT-DFW franchise leadership team to gain an understanding of operating norms and practices. Participants included the sales manager, franchise owner, head of operations, and head of training. For example, the interview asked:

- *How long have you been in the Dale Carnegie business?*
- *Tell me how you created your business model. Is it something that was a part of the franchise package that you got from Dale Carnegie, or is it your own strategy? Tell us a little bit about that.*

These were unscripted preliminary questions designed to help the project team understand the problem of practice.

Protocol Reference Guide

We used Zoom to schedule meetings with all of the participants. Participants who told us during the survey that they were willing to participate in a follow-up one-on-one interview received a formal interview invitation via email. After receiving an email response affirming a participant's desire to participate, we thanked them for their willingness to participate and told them to expect a Zoom invite titled "Vanderbilt Carnegie Study." If a participant needed to

reschedule for any reason, we asked them to suggest times that would work best for them and rescheduled our meeting. We also considered what to do if we did not receive a response after following up with a participant. In that case, we did not continue contacting the participant; we did not want to shape negative perceptions of our intentions and damage relationships. All participants received a meeting reminder within 24 hours of our meeting to maximize participation and avoid last-minute cancellations.

Contingency Plan

When Zoom failed to work before or during the meeting, we asked if participants would be willing to use Google Meets on our phones, and if that failed, we would try to FaceTime participants. If internet connectivity was lost, we suggested continuing the conversation on our cell phones.

Data Analysis

We leveraged a mixed methods approach to add richness, context, and color to our study of salesperson retention. A mixed methods approach combines both qualitative and quantitative analysis, which strengthens the findings when studying the phenomenon of sales force turnover (Donald & Clair, 2018). A survey served as our primary method for collecting quantitative data, and we based our scoring on Barksdale et al.'s (2003) research. Interviews served as our primary method to collect qualitative data, which added depth to the survey findings.

Out of a total of 26 former salespeople who worked at DCT-DFW between 2012 to 2022, we retrieved contact information for 22 of them. We attempted to contact all 22 potential participants via email, text messages, and phone calls. Two said “no”; they were not interested in taking part in our study. Nine participants said “yes” and took the survey, and seven out of those

nine participated in the interview. The remaining 11 out of the 22 did not reply to our multiple contact attempts.

We first sent an email to all 22 potential participants with an embedded survey link. Five of the participants responded. We then sent text messages to remind participants who had not yet responded to take the survey, and eventually, nine people took the survey. One of the survey questions asked participants if they would be willing to participate in an interview. All but one said "yes" that they would participate in an interview, but one of the respondents was a current employee, so we excluded them from our study because our focus was on former sales employees. After nine people took the initial survey, we felt trying to get more participation could backfire by hurting existing relationships.

Survey Analysis

The survey consisted of 26 questions from the Barksdale et al. (2003) study, and we added questions about compensation and supervisor support from relevant studies on socialization and salesperson retention (Bridges et al., 2007; Chullen et al., 2011; Eisenberger et al., 2002; Shoemaker, 1999). We exported the survey results and converted the responses to numeric values based on a five-point Likert scale that was used in Barksdale et al.'s (2003) study. We averaged the results of each survey question using both the median and mean to determine high and low scores. We ordered the results from high to low and color-coded the highest and lowest five survey question scores. We did not implement a step from the Barksdale et al. (2003) study which evaluated the interconnectedness of each element within the framework.

Barksdale et al. (2003) tested and analyzed their framework using Structural Equation Modeling (SEM) which assesses the interconnectedness of each element within a framework or

structural model. For example, how might an employee's perception of training and role clarity impact their job stress and performance? An SEM assessment measures the strength of the relationship between these elements (perception of training, role clarity, job stress, and performance). In the case of DCT-DFW, an SEM analysis will not apply because the sample size was not large enough to draw concrete conclusions that would be generalizable. Wolf et al. (2013) found that most SEM sample requirements should surpass 100 or 200, but in their study, they found that at least 40 cases would suffice. Our sample consisted of nine participants, which did not meet the 40-case standard. However, we still measured and analyzed dominant themes and their interconnectedness based on the Barksdale et al. (2003) socialization framework. Although our findings may not be transferable based on our sample size, we agreed that our findings would lay the groundwork for future research and provide valuable insights for DCT-DFW. We also added and assessed compensation and perceived supervisor support as elements not accounted for by Barksdale et al. (2003), which we substantiated in our literature review of socialization. After sorting the survey scores based on high and low scores, we turned our attention to the short answer questions in the survey.

We included short answer questions that were open-ended to add more context to the survey. These questions broadly asked why the participants chose to work at DC, what made them stay, what would have kept them longer, what made them leave, and what advice they would give to DCT-DFW. We read through these responses and discussed the results as a team. The responses to these questions coincided with the survey results and guided us on how we constructed the interview questions.

Interview Analysis

The interviews were scheduled for 30 minutes to accommodate work schedules and maximize participation. We needed to ask questions that added more context to socialization factors that influence salesperson retention. Based on the survey responses, we targeted role expectations and responsibilities, compensation, and leader support. We designated one member of our team to interview each participant to ensure consistency. This interviewer is a human resources executive and expert and knows how to navigate questions regarding responsibilities, compensation, and leader support. Each interview was recorded and transcribed, enabling us to capture meaning. We checked the interview transcriptions for errors, and then we met as a team to align on how we were going to analyze and code the interviews.

Based on our research analysis and understanding of phenomenological studies, we decided to use a content analysis approach to extract meaning. Content analysis is a research tool that identifies common themes or concepts that can be quantified and counted (Ritchie & Spencer, 1994). The results of a content analysis add more depth and meaning to a phenomenon, such as salesperson retention. Content analysis consists of multiple methods to code qualitative data (Ritchie & Spencer, 1994). We chose to leverage the framework analysis approach, which identifies predetermined themes based on a framework, enabling us to code the interviews to our socialization model. The Barksdale et al. (2003) study and our literature review identified specific components that led to salesperson retention, and we coded the interviews against those determinants of salesperson tenure. There were a total of 11 categories or buckets that represented each element of Barksdale et. al.'s (2003) socialization model and compensation and leader support. We added an additional category that we labeled "other" for comments that we felt related to retention but could not cleanly fall within the other 10 buckets.

All three of us read, analyzed, and coded the interviews. Before we began coding, we met and practiced coding the interviews with an actual interview excerpt to align on deciphering meaning. We created a coding document that served as a glossary of important terms and included steps. We aligned on term definitions based on Barksdale et al.'s (2003) study, and if they did not define an important term, we looked at relevant research. Here is an example of how we defined a few elements based on the research:

- Task-Specific Self-Esteem (SE) - "Refers to an employee's feelings of competence in performing job-related tasks" (Barksdale et al., 2003)
- Job Stress (JS) - The perceived apprehension, pressure, or worry about doing the job. Job stress is also linked to role conflict.
- Performance (P) - "Relates to the accomplishment of job-related tasks." (Barksdale et al., 2003)

After we defined each element within the socialization framework, we assigned each term a one-to-three letter code. As seen in the recent example, Task-Specific Self-Esteem was assigned the two-letter code "SE, if we perceived the participant made a negative reference about Task-Specific Self-Esteem, which means they expressed doubt regarding their ability to perform their role. If we felt that a comment related to why people stayed (retention), we placed a lowercase 'r' at the beginning of the letter sequence. For example, 'rSE' would indicate that the participant positively referenced Task-Specific Self-Esteem, meaning they expressed confidence in their ability to successfully perform a task related to their role. Here are all the turnover-related codes we used for our socialization framework:

- Realistic Job Preview (RJP)

- Role Clarity (RC)
- Perception of Training (T)
- Task-Specific Self-Esteem (SE)
- Job Stress (JS)
- Performance (P)
- Compensation (C)
- Satisfaction with Organization (SWO)
- Affective Commitment (AC)
- Leadership Support (LS)
- Other (O)

After we attached codes for each framework element, we added a lower-case "r" to distinguish retention and turnover-related comments. The following are our assigned retention codes:

- Realistic Job Preview (rRJP)
- Role Clarity (rRC)
- Perception of Training (rT)
- Task-Specific Self-Esteem (rSE)
- Job Stress (rJS)
- Performance (rP)
- Compensation (rCr)
- Satisfaction with Organization (rSWO)
- Affective Commitment (rAC)
- Leader Support (rLS)

- Other (rO)

We coded both turnover and retention comments in separate tables and by category to better understand how DCT-DFW would influence employee retention. The following is an excerpt from our coding sheet that explains the guidelines we followed during the coding phase:

- Each coder will watch or listen to the interview before coding the interview transcription.
- Each coder will add, in the body/text of the interview, an abbreviation each time a theme is mentioned in the interview. The coder should read and code the text two times.
- There may be multiple codes in one sentence, depending on the number of times a topic was mentioned, if a topic was inferred, or if there was both an attrition and retention-related comment. Each code abbreviation will be independently separated using the parentheses to help count the number of abbreviations (rT) (SE) (RJP).
- The coders will add the number of times each abbreviation code is inserted throughout the text. Each coder will input this total in the scoring table.
- If a turnover or retention-related comment falls outside of the 10 themes, the coder will label that phrase or sentence with (O), indicating we will need to revisit those sections to determine if a new theme is warranted.

These steps ensured consistency in how we prepared and coded each interview. After we outlined our workflow, we designed a scoring table to count the number of turnover-related comments by theme. The following is the scoring table that shows how we totaled the number of turnover-related comments for each element of the socialization framework:

	Int 1	Int 2	Int 3	Int 4	Int 5	Int 6	Int 7	Total
--	-------	-------	-------	-------	-------	-------	-------	--------------

Realistic Job Preview (RJP)	1	2	1	9	5	1	5	24
Role Clarity (RC)		20	6	12	4	1	11	54
Perception of Training (T)		1					2	3
Task-Specific Self-Esteem (SE)		6		3	1			10
Job Stress (JS)		13	4	6	2		9	34
Performance (P)				1	2			3
Compensation (C)	1	9	1	6	8	1	3	29
Satisfaction with Organization (SWO)	1	7					3	11
Affective Commitment (AC)	1	1		1				3
Leader Support (LS)		9		1			8	18
Other (O)	4	3		2	1			10

After our first pass at coding the interviews, we reconvened to discuss our results. We recognized we were misaligned on how we were coding certain categories, specifically RJP, and role clarity, so we decided to take a second pass at coding the interviews. After our second coding effort, we found that we started gaining insights and were more aligned. We met with our faculty advisor and chose to take a third pass on reading each interview because we realized we should identify positive comments that influenced retention. We did not code retention-related

comments until this third attempt. We followed the same table design we used earlier for tallying turnover comments. The following is the scoring table that shows how we scored the number of retention-related comments for each element of the socialization framework:

	Int 1	Int 2	Int 3	Int 4	Int 5	Int 6	Int 7	Total
Realistic Job Preview (rRJP)	2	7	6		2	1	1	19
Role Clarity (rRC)	2	3	2	2	4	1	3	17
Perception of Training (rT)	7	9	3	3	5	2	3	32
Task-Specific Self-Esteem (rSE)	6	4	3	3		6	3	25
Job Stress (rJS)		1		2	1	4		8
Performance (rP)				1		3		4
Compensation (rCr)		2	1			5	3	11
Satisfaction with Organization (rSWO)	2		2				2	6
Affective Commitment (rAC)	2	3	4	6	1	2	1	19
Leader Support (rLS)	2	10	9	5	6	2	4	38
Other (rO)	1	2	2		1	1	2	9

We originally set out to influence future retention by studying what led to former employee attrition, however, as we referenced the research, we realized we needed to analyze the factors that also made employees want to stay at Dale Carnegie.

Barksdale et al.'s (2003) and Dubinsky et al.'s (1986) studies centered on the factors that lead to sales force retention, and we recognized we were missing reasons for salespeople staying, which would strengthen our findings. Once all the interviews were coded and tallied according to both turnover and retention comments, we calculated internal consistency among raters.

We chose to measure internal consistency to determine if we met an industry standard, which would help us feel more confident about our findings. We selected the Cronbach Alpha method because it is designed to measure internal consistency when a study involves composite scores of multiple elements and subjects. We had seven subjects (interviewees) and 11 elements based on our socialization framework and two scoring tables for turnover and retention comments. Each time a comment from the interview mentioned an element that connected to our framework that either led to a sales employee staying or leaving, it was tallied. These tallies were totaled by coder and plugged into the Cronbach Alpha formula.

Triangulating the Data

A third component of the evaluation involved analyzing organizational data that strengthened the findings. We analyzed the compensation plans for each employee, including how they performed, and cross-referenced our findings with each survey score and interview. The following table shows how we organized employees' compensation based on their contract and performance, which allowed us to cross-reference this information with the survey and interview scores:

EE	Base Comp	Tenure (yrs)	Total rev	Total rev/ yr	Projected earnings	Amt above or below \$210,000 threshold	Actual earnings	Actual base + salary
1	48,000	1.7	425,477	246,506	36,976	36,506	5,476	53,476
2	42,000	2.7	318,114	119,333	17,900	-90,666	0	42,000
3	48,000	1.0	238,353	237,702	35,655	27,703	4,155	52,155
4	50,000	1.5	115,623	77,152	11,572	-132,848	0	50,000
5	42,000	0.6	59,939	105,182	15,777	-104,818	0	42,000
6	42,000	0.8	42,544	61,387	9,207	-148,622	0	42,000
7	30,000	0.2	43,053	176,567	26,485	-33,432	0	30,000

Assessing employee information, such as their tenure, earned commissions, added more to the narrative making our research more clear and compelling. Through multiple discussions, we interpreted that data, referencing our own experience and more importantly the literature that substantiated our findings. A cogent and cohesive story began emerging following our analysis discussions based on our research questions.

Limitations

We interviewed the owner before we started our research, but now that we have completed our evaluation, we have unanswered questions that would close understanding gaps. For example, we would ask, “You indicated you have complete control over how much you can

pay an employee, so what caused you to pay sales employees much lower than industry standards while holding high growth expectations?" Closing the loop with the owner would provide insights for us and him.

We took notes of our initial conversation with the owner, but we did not record and transcribe his assessment of the problem. We tried to recall what we discussed, but we could not recapture the tone and details that would have provided clarity as we conducted the study. We did not realize that each person we interviewed reported to the owner and his involvement level in daily operations. Once we realized how he influenced the work life of employees, we wished we could have referenced his comments because they could have provided critical insights.

We also acknowledge our bias. Initially, all three of us agreed with the owner that he should maximize and grow profits as fast as possible. He should flex his authority and replace DFW employees who did not share his values and philosophy on how to grow the business. We could not wrap our heads around the perceived complacency of DFW employees who unabashedly confessed their disdain for profit-centric thinking. We initially failed to see that the owner was fighting a losing battle by being at odds with the Dale Carnegie culture instead of adapting to a business model that has endured for over 100 years.

Another potential limitation is that one of our team members worked at the DFW branch and has a personal relationship with the owner. The participants of the study knew this and possibly withheld information believing their comments would be traced back to them. The branch owner is a well-established and influential businessperson who runs multiple businesses outside of Dale Carnegie; thus, maintaining a good relationship with him may have been a priority.

Our coding of the interview transcripts revealed career development and offering a hybrid work from home schedule as additional themes that we did not explore as a part of this study. Future studies regarding retention at DCT-DFW should explore that concern more closely.

Findings

Research Question Part 1: From 2012 to 2022, how did DCT-DFW socialize new salespeople? How have these socialization efforts impacted retention and attrition?

Socialization

Our work investigated factors for both retention and attrition of sales employees at this organization. Because we are anchoring our work on the Barksdale et al. (2003) model of continuance commitment (retention), we will first present the findings on why sales employees stay followed by the findings on why they leave for each part of our research question.

Retention

According to participant surveys, here are the top reasons, based on a five-point Likert scale (five being the highest), why employees stayed with the organization:

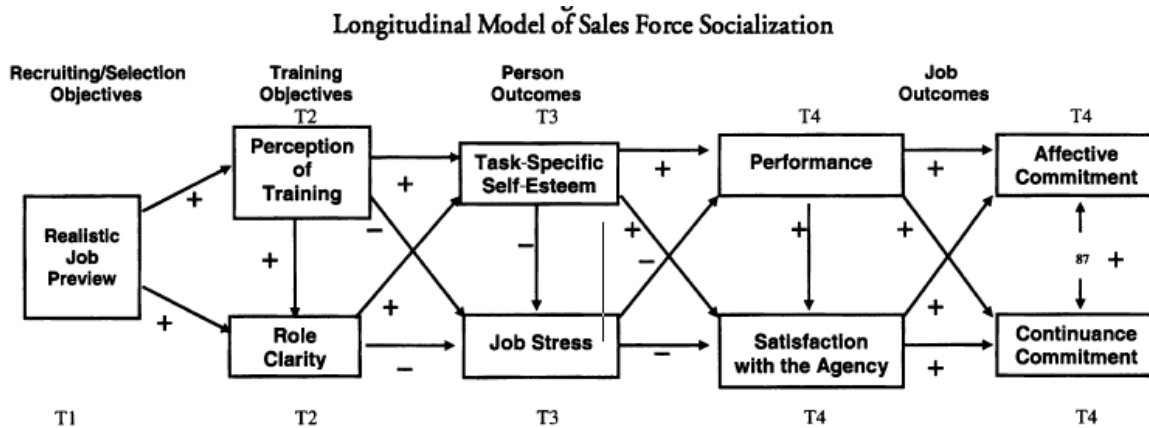
Survey Question	Mean	Median
The employees made me feel welcome when I joined.	4.7	5
I felt comfortable approaching other employees if I had a question.	4.5	5
I enjoyed discussing my company with people outside it.	4.5	5

What kind of apprehensions or worries did you have about your career as a salesperson at DC? Use the scale to indicate how concerned you were about each of the following issues. [Being accepted in the company]	4.4	5
Based on the experience you had in your role as a salesperson, rate how satisfied you were with your own performance. [Personal/professional development]	4.3	5

Participants felt welcomed by other employees and experienced a sense of belonging. They were proud to belong to Dale Carnegie and were happy to talk about their work and company to others. The participants came into the role with an affection for the organization, which is not typical when employees start working. The participants were pleased with their professional and personal development, which is associated with task-specific self-esteem (Barksdale et al., 2003).

From the perspective that socialization equals a sense of belonging, DCT-DFW scored very high. The highest-rated questions within the survey were “The employees made me feel welcomed when I joined” and “I felt comfortable approaching other employees if I had a question.” The conspicuous people-centric culture permeated throughout our study, but socialization includes more than a friendly onboarding experience. We return back to Van Maanen and Schein’s (1979) definition of socialization as “...the process by which an individual acquires the social knowledge and skills necessary to assume an organizational role” (p. 211). As

we look at the Barksdale et al. (2003) socialization framework, we will discuss the elements that impacted retention based on this definition that extends beyond handshakes and hugs.



According to participant surveys, here are the top reasons why employees said they stayed with the organization:

Top reasons employees stayed (retention)	Total
1. Leader Support	107
2. Perception of Training	81
3. Task-Specific Self-Esteem	56

Leader Support. Both the surveys and interviews highlight leadership interaction as a key reason why employees stay with the organization. We will unpack leader support and its impact in the findings sections below for RQ section 1C, which specifically addresses its impact. The second and third most common interview findings regarding retention are described next.

Perception of Training. Dale Carnegie is known for its training program, and employees can enjoy free access to classes on personal development that can be applied to sales

performance and leadership (Osborne, 2011). Barksdale et al. (2003) claim that training should reinforce Realistic Job Previews (RJP) and provide tactical skills that clarify role definition and the behaviors that yield results. We found that the employees who stayed in their roles longer had a positive experience with Dale Carnegie before they were hired and had a penchant for personal development. In the interviews, an employee shared a positive perception of the training he received from DC: “I found that [the training] actually was beneficial for me in my sales career. More than almost anything, I would certainly say more than the actual job of being a salesperson at Dale Carnegie [the training] helped me in my sales career.” In the five months he stayed at DC, he experienced a transformational training experience that impacted his career. He accepted a well-paying sales job at Amazon after Dale Carnegie. Another sales employee who left around six months agreed: “A lot of good training for sales and coaching on how to pitch your product which, you know, basically has helped me in future endeavors after that as well.” Yet another employee parlayed her training at DC to start her own training and coaching business. It is critical to point out that the employees at DC rated the quality of training high, but these comments were associated with the DC national brand, not the training they received from their local leadership. DC employees attend national training and enjoy access to these trainings throughout their tenure, and it impacts their task-specific self-esteem.

Task-Specific Self-Esteem. Barksdale et al. (2003) define TSSE as “an employee’s feelings of competence in performing job-related tasks” (p. 127). It is synonymous with self-efficacy which directly relates to the competence required to successfully carry out a task (Barksdale et al., 2003). One employee described TSSE at Dale Carnegie as:

You don't oftentimes get the chance to actually learn about the product that you're selling and sort of use the product I guess maybe if that's a good way to put it, so yeah, it was a job where I learned about selling, and learn how to be a good salesperson.

One of the highest scores (4.38 out of 5) from the survey involved the participant’s satisfaction with their personal development, which is directly linked to TSSE (Barksdale et al., 2003). The participant went on to attribute his skill development to the training he received from DC:

Like it's stuff that sticks with me even to this day. And I find myself, every once in a while, being like, oh, yeah, I remember this thing that I learned, which was 10 years ago, right? I'm still going to use it in this speech I have to give today.

Related to this comment, we found most comments related to TSSE involved job-related tasks that were not associated with selling. As we pointed out, five of the seven employees we interviewed trained and sold training products, and most self-efficacy comments involved tasks corresponding to people skills and competencies that could impact selling results, but most were not specific to the sales role.

Attrition

According to the survey participants took, here are the bottom scores which were based on a five-point Likert scale (five being the highest):

Survey Question	Mean	Median
The pay matched the degree of difficulty of the job.	2.3	2
I felt motivated by the pay structure.	2.4	2.5
I would have been very happy to spend the rest of my career with this company.	2.7	2
What kind of apprehensions or worries did you have about your career as a salesperson at DC? Use the scale to indicate how concerned you were about each of the following issues. [Meeting supervisors' expectations]	2.9	2.5
The company did a good job selecting its sales leaders.	2.9	3

Compensation and interaction with leadership show up as the key attrition themes based on survey results. Because our subsequent research questions (1B and 1C) specifically ask about compensation and leader support, we will address these findings in depth in those sections.

According to participant interviews, the most common attrition factors were the following:

Top reasons employees left (turnover)	Total
1. Role Clarity	125
2. Job Stress	99

3. Compensation	82
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Role Clarity. Role clarity, or lack thereof, clearly emerged as the predominant theme that led to people leaving DCT-DFW. Out of the 507 turnover comments (intention to leave), 125 (25%) involved a lack of role clarity based on our coding methodology. We defined role clarity as how well the job was explained and how much authority employees had to do the job. Barksdale et al. (2003) confirm that role clarity is the “explicit or implicit agreement with the work group that articulates what tasks recruits are to perform, what the priorities of the tasks are, and how recruits should allocate their time among the tasks” (p. 126). Examples from our study included job title confusion, mixing of training and sales roles, no clear sales goals or metrics, and absence of behavioral coaching to drive sales performance.

Job Title Inconsistency. The owner attempted to cater to individuals and tried to mold and modify roles to the aspirations of the individual. Here are some of the job titles of sales professionals at DCT-DFW. Most of these titles were given to people who were individual contributors who had similar responsibilities: vice president of regional sales, performance consultant, sales consultant, director of corporate solutions, market president, and executive vice president. This attempt to tailor roles and titles appeared to have caused confusion regarding what each person specifically needed to do and how. There was a lack of clarity on what each job title required and what it did not require.

Trainer and/or Salesperson Roles Commingled. The roles of a trainer and a salesperson are distinct yet complementary. Ultimately, there is value in one person having both titles over time, but the key is to space them out in a manner where a new person should first master one

role and then take on the other. A roadmap needs to be in place such that when certain metrics are attained, then the next role is brought on. The owner of the Tampa Bay Dale Carnegie franchise describes:

So, a consultant starts as a junior consultant where they basically enroll people in classes. As they get past about a year, they began to do more. They can sell on-site programs, you know, put people together in a class on-site like the Dale Carnegie course on site, or a sales course on site with 15 people. After about a year and a half, they typically become instructors. And then they can teach, you know. They can deliver the Dale Carnegie product. So, my people are all very senior people with 10-plus years of experience so they can sell. They can deliver, they can consult, they can do a lot more work than a newer person. But it's also a challenge because when we hire someone, it's a two-year process maybe to get them to that point to be Carnegie certified. So, it takes a while to do that.

In the case of our partner organization (DCT-DFW), it appears that new employees were encouraged to take on both roles right away regardless of their passion for one or the other or having attained sufficient proficiency in either role. This premature commingling of roles led to a lot of confusion and reduced effectiveness in both roles. On this topic, one participant stated, "If I were advising the owner, it might be that don't let a salesperson become a certified trainer at least in three years."

Lack of Clear Sales Goals and Metrics. Participants claimed that they were not given clear and consistent sales goals or specific sales targets to achieve. They did not have a way of

knowing if they were doing well or whether they were achieving expectations. Salespeople were expected to grow sales without clearly outlined benchmarks.

In speaking with the various members of the DCT-DFW legacy leadership team, we learned that not all members of this senior team were bought into the aggressive growth plans that the owner had. The franchise owner had unsuccessfully tried to convince his team that it was necessary to grow at such a high rate. This inability to gain alignment was another reason for new hires to feel confused by mixed messages from leadership. While the owner said one thing, the head of operations or training may have said something different. The following comment by a participant captures this sentiment: "I felt a little like it was a moving target constantly as to you know, what is success? What is that we are looking for? What's our goal? Like I was always one step behind." The absence of clarity was conveyed in almost all our interviews, and our evidence suggests it stemmed from leadership.

Consistent Sales Direction and Sales Coaching. Despite all the positive comments about the professional development training that Dale Carnegie provided, we learned from our interviews that very little sales-specific training and coaching was provided to sales employees. Several participants commented that they needed help in prospecting and closing, two of the most essential sales-related roles, yet they were not getting the task-specific coaching they so desperately needed, which led to frustration. Additionally, new sales employees were not given adequate direction on where to focus their energies and which accounts to focus on, and in which order. Due to the varied titles, reporting relationships were not clear as the ultimate person everyone reported to was the owner, who was new to the business himself.

Job Stress. We defined job stress as the perceived apprehensions, pressure, or worries about doing the job (Barksdale et al., 2003). Job stress is linked to conflict and tension between individuals or effort and outcomes (Dubinsky et al., 1986). Not understanding how one's efforts translate into performance compounds job stress. In other words, the more one experiences a lack of role clarity, the more likely this increases job stress (Barksdale et al., 2003). Here is an example of a comment that sheds light on this:

To his credit, I think he had all the best intentions in the world, but I just wonder whether or not he was a great manager, or maybe he took it in the wrong direction and just cannot get it back there. From that moment on, it got quite chaotic. And it was enough to say you know, I think this is getting stressful.

This comment demonstrates the link between leadership actions, a lack of role clarity based on unclear goals, and an increase in job stress. Job stress constituted 20% of turnover-related comments and combined with role clarity, almost half of all comments centered on these two factors.

Socialization in a Franchise Model

We found that the franchise business model challenges Barksdale et al.'s (2003) socialization framework. A franchise model decouples branches from the national association, which changes how new hires are onboarded. Even though we found that sales employees rated their RJP slightly above the mean score (3.86 vs. 3.60), the interviews substantiated that sales employees lacked role clarity.

Counter to what the research claimed about the connection between role clarity and training, sales employees rated their training experience as extremely high quality and attributed

their positive experience and intentions to stay to the training they received. Following the sequence of Barksdale's model, a clear RJP combined with a high perception of training should lead to an increase in role clarity. However, the most salient theme that led to turnover was a lack of role clarity, which translated to high job stress and lower performance as the Barksdale et al. (2003) model predicted. How did a strong RJP and high perception of training not positively impact role clarity?

A franchise model consists of a centralized association and independent local branches potentially change the socialization process as outlined by Barksdale et al. (2003). For example, DCT provides world-class training for both customers and internal employees. New sales employees are trained by the national association, consisting of highly skilled trainers and a refined curriculum. New sales employees go through training as if they were going to be a trainer, which explains why it is not uncommon for a sales employee to be trained as a trainer. The owner of the Tampa branch supports this model, claiming an effective sales employee must know the product or service they sell, and because they sell a training experience, they should know how to train. Sharing training responsibilities between the national association and a franchise may alter the socialization process that measures a sequence of events controlled by a single entity.

The employees who had the lowest RJP did not expect to train, and it was not their passion, but they still found the training extremely useful. When sales employees referenced their training experience, they always discussed the training they received from the national association, which seemed organized and engaging. Not one participant referenced the quality of

training received from the DFW branch. They only discussed the support from their local leader, which was the branch owner.

Although the participants regarded the owner as an excellent motivator, they did not learn the skills necessary to succeed in the sales role—a critical component of the socialization process (Barksdale et al., 2003; Dubinsky et al., 1986; Menguc et al., 2007). Paradoxically, we discovered that the owner had the lowest RJP score and shared the opposite perspective of the participants with respect to rating the difficulty of the sales role. This incongruence demonstrates how the owner had an opportunity to gain a better understanding of the role and, therefore, could not provide training that would enhance role clarity. Instead, sales employees felt pressured because they lacked tactical coaching, or they felt the owner's attempts to generate more sales without clear goals and incentives exacerbated role ambiguity. The training the participants received from the national association focused on self-development and confidence but did not address specific sales skills. The owner, who did not receive any formal training on being a branch owner and was not familiar with the intricacies of Dale Carnegie, stirred up action without direction instead of providing clarity. Role clarity was not the only disjointed socialization factor based on our framework.

Barksdale et al. (2003), like other researchers (Dubinsky et al., 1986), found that affective commitment, defined as the congruence between personal and organizational values, grows and evolves as employees successfully socialize. We found that the sales employees who stayed and performed better than other employees were attracted to DCT because they had an affective commitment before they were hired. If they did not have a positive, previous experience with DC, they had friends or family members positively impacted by the training. We also found that

they were extremely passionate about self-development. Job applicants may enter DC already aware and aligned with organizational values, which is something we did not consider at the onset of our study. Socialization may be enhanced if employees already identify with the organization.

Compensation

Research Question Part 2: Do participants perceive a relationship between retention or attrition and how DCT-DFW has **compensated** new sales employees? If so, what is the relationship?

Compensation was not mentioned as a reason for employees wanting to stay at this organization. We determined from our conversations that those who stayed long-term did it despite the low compensation. Many DCT-DFW employees work there for the positive impact the company makes in the lives of others. Our data collection and analysis suggest that compensation heavily impacted turnover.

Survey Findings. Two questions in the survey focused on compensation to help us answer the research question and understand participants' perspectives on the impact that compensation had on their reason for staying at or leaving DCT-DFW. In addition, answers to the open-response questions also provided valuable insights.

The first compensation-related survey question asked respondents if the pay they received matched the job's degree of difficulty using a five-point Likert scale that ranged from 1 = strongly disagree; 2 = disagree; 3 = neither agree nor disagree; 4 = agree; and 5 = strongly agree. Two-thirds of the respondents who answered this question either disagreed or strongly

disagreed that their pay matched the job's degree of difficulty for an average score of 2.25, which means that respondents overall disagreed.

The second compensation-related survey question asked the respondents if they felt motivated by the pay structure using a five-point Likert scale ranging from 1= strongly disagree; 2 = disagree; 3 = neither agree nor disagree; 4 = agree; and 5 = strongly agree. Two out of nine respondents said they strongly agreed, and another two said they neither agreed nor disagreed. The remaining four respondents disagreed with the question for an average score of 2.35, which again means that respondents overall disagreed with the question.

The final portion of the survey that provided information to help answer research question three consisted of open-response questions. Specifically, one of the questions asked respondents what caused them to quit. Five out of the nine, or 55% of respondents, said compensation had an impact on their decision to leave the company. For example, one respondent said they quit because they could not make enough money. Another respondent said they quit because the pay structure changed multiple times, not to their benefit, in one year.

Additionally, another open-response question asked respondents what would have caused them to stay. Three of the nine responses focused on compensation. For example, two said consistent pay structure and the other said "bigger money." Therefore, we can infer that compensation impacted participants' decision to stay or leave DCT-DFW.

Interview Findings. The one-on-one interviews with participants revealed that DCT-DFW compensation practices over the years negatively influenced some of the participant's decision to leave the company. The interview question specifically asked participants how satisfied they were with the compensation, benefits, perks, and incentives offered and to state the

impact, if any, this had on their reason for leaving the company. Many of the respondent's feelings about DCT-DFW compensation practices were negative, and the common themes were that the pay was too low and it took too long to earn any bonus or commission due to the long sales cycle. For example, one participant who worked for DCT-DFW for under two years said, "I never worked so hard for so little pay...When I came in, my base pay was \$50K plus commission, which is typical for a salesperson, but I had never been on a commission structure before, so I didn't know what to expect...I can't remember what percentage, but it was based on the overall growth of the organization. I don't even know that I ever got any bonus." Another participant said, "Working commissioned is not easy."

Another theme that surfaced was the compensation program's inconsistency during a salesperson's tenure. Some participants said that the compensation program changed at least once during their employment, which caused some frustration. For example, a participant said, "As we grew, as we changed, as we progressed, they changed the compensation to be pretty much it was a base plus commission, but if you didn't meet your commission, if I remember right, it was if you missed it, in two...months' time frame. They essentially went down on your base, and it became very hard to predict...that change was drastic enough that I said...this probably isn't great for some of my life goals and saving money." Another participant said their pay type was a base plus commission program when they began working for the company. They also said, "I think there was a little bit of a pullback in the economy. At that point. And so it was harder to get people in, so then it switched to commission only, which is when I had to look for other things."

These comments and others provide additional insight into the low-scoring compensation-related survey results mentioned earlier and allow us to conclude that some

salespeople attribute their dissatisfaction with their pay as a contributing factor to leaving or staying with the company. According to Roberts and Chonko (1996), satisfaction with pay is a significant predictor of intent to turnover. They also said an improved understanding of the antecedents of satisfaction with pay might provide insights to help leaders better manage retention.

Document Review Findings. A review of DCT-DFW documents related to compensation provided insight into the various salesperson work arrangements and pay structures over the past 10 years. The finding suggests that a lack of clarity and inconsistencies in compensation practices impacted retention.

Specifically, the DCT-DFW leadership team provided various documents to the project team in response to our information request, which included four offer letters, two employment agreements, and three independent consulting agreements. Additional documents provided were salesperson resumes, balance sheets, profit and loss statements, and annual sales reports. The review of the submitted documents revealed that the franchise used various compensation plan designs (e.g., commission, salary plus commission, salary only) to attract and retain salespeople. However, the type of compensation plan offerings changed over the past 10 years, which caused confusion and frustration among the sales workforce, as evidenced by the interview comments in the previous section. According to Fahr et al. (1989), salespeople prefer compensation plans that yield the maximum expected rewards.

In addition, DCT-DFW gave us access to a report that included data on the total dollar amount of sales collected for each salesperson and their starting pay and commission plan. The organization utilized two compensation plan options to compensate 25 salespersons who worked

for the franchise at different times during the past 10 years: commission only and base salary plus commission after collecting \$17,500 in sales per month. One outlier received a commission after collecting \$20,000 per month.

Six individuals received commission-only compensation. Five of the six, or 83%, left the company within two years of their start date. Also, half of those who only received a commission as pay left the company less than six months after starting at DCT-DFW, and four of the six were independent contract consultants. There is currently only one salesperson at DCT-DFW who receives commissions only as pay, and that person is one of the highest revenue-generating sales professionals in the company. These findings suggest that the commission-only pay structure did not positively impact the retention of salespeople during the past 10 years. One limitation of this finding is that none of the commission-only or contract consultants who left the company completed the survey or interview, providing no opportunity to understand this finding better.

Nineteen individuals received the base salary plus commissions compensation plan, of which 16, or 84%, left the company within two years of their start date at DCT-DFW. Nine left in less than a year, and four left in less than six months. Interestingly, an analysis of this data revealed that only a small percentage of salespersons who received the base salary plus commission after achieving the monthly collection threshold earned any commissions. Specifically, only 31%, or six of 19 sales representatives, reached the monthly collection threshold to earn a commission in the past 10 years. In addition, four of the nine salespeople who left the company within two years of their start date completed the project survey, where an overwhelming majority said the pay did not match the job's degree of difficulty. They also said

they did not feel motivated by the pay structure and that the plan changed unexpectedly, making it more difficult for them to support their financial needs.

Research regarding the impact incentive programs have on motivating salespeople to sell more found that much higher satisfaction levels were evident when rewards were contingent on performance (Williams & Livingstone, 1994). These findings suggest that the sales commission threshold was too challenging to achieve and adversely impacted retention.

Low pay, lack of clarity, and inconsistencies in compensation practices negatively impacted retention at DCT-DFW. The one-on-one interviews with participants provided evidence that supported the survey results and informed our recommendations which we will detail below.

Leader Support

Research Question Part 3: In what way do participants perceive a relationship between **leader support** they received and their decision to stay or leave DCT-DFW?

Participants connected their intention to stay to leader support more than any other category. Out of the 416 total retention-related comments, 26% (107) corresponded to leader support. In all seven interviews, each participant mentioned the owner when discussing leader support. They considered him an exceptional leader and person. The following comments capture the common sentiment shared by each participant. One described the owner as a “Wonderful person, he’s caring, and pushes himself.” Another said:

I cannot describe a better person. The guy's amazing. Yeah, he's an awesome person.

Great to work with. Great guy. I just wish I could sell more so I could be there you know.

That was the only sad part. I felt like I kind of let him down because I couldn't sell enough.

Interestingly, they viewed the owner as the person who provided support, which continues to reinforce the owner/operator model that permeates throughout the DC branches. Leader support involved role-playing, coaching, and inspiring via team meetings (Bass & Riggio, 2006). The owner made himself available to his employees and took an interest in their work. He consistently asked questions and made attempts to coach them through challenges.

One participant shared that he was "very helpful, always wanted to coach what the issue was. If sales were slumping, he never made us feel like it was our problem. It was more like; how can I help you sell more? What are the roadblocks you see? How can I help? He's a great guy." He exercised individualized consideration, which is associated with the characteristics of a transformational leader and synonymous with leader support (Jong & Ford, 2020). Some of the comments made by employees that corroborated that they received a tailored job said their job "...was a newly created position just for me, exciting, fit my time management plan" and "That was a special position that was created just for me." Not only did he tailor titles to sales employees, but he also matched their job descriptions to their passions. For example, one participant whom the owner convinced could sell claimed, "The part of the organization I was most interested in was the training, and the training itself is transformational." As a result of the training she received from Dale Carnegie, she started her own successful coaching and training business. Dale Carnegie offers training courses for free to current employees, which the participants universally shared is a major benefit of being a DC employee.

We found that it is not uncommon for a DCT employee to perform multiple job functions. The employees who both trained and sold were more passionate about training than sales and found themselves gravitating toward training more than selling. Interestingly the employees who trained and sold stayed much longer than the employees hired to strictly sell.

The owner cared about his employees, and they regard him as a positive leader who supported them throughout their tenure, which led to their intentions to stay. However, his support also led to a lack of role clarity, which was the number one reason people left the organization.

As mentioned earlier, despite providing personalized support to each of the participants, the owner did not set goals or hold people to a performance standard, which contradicted his aggressive growth mentality. Dubinsky et al. (1986) found that individualized consideration is equivalent to perceived supervisor support and should be combined with transactional leadership characteristics (contingent reward) to optimize sales results. They claim that despite efforts to provide support if sales employees do not have clear goals and are not held accountable to those metrics, they lose focus, which leads to confusion, stress, and lower sales performance.

We did not find one example that showed sales employees understood how they were assessed by their supervisor. When we asked if there were any goals or metrics they had to achieve or if there were personal incentives, one participant summed it up for us, saying “no.” We found this to be a consistent response among the other participants.

Setting sales targets is vital to clarify what is expected. In our quantitative survey, meeting manager expectations was one of the lowest-rated scores. Contrast this finding with the highest scores from the survey scores on belonging and feeling welcomed. Although their direct

leader provided a friendly culture, he did not provide clear targets. Not only do goals help a sales force measure their success, but they also help them identify how to achieve those objectives, which enables employees to determine which actions render the best results.

According to the survey, sales employees rated themselves low in important sales skills (prospecting/closing/selling). Although the owner took interest in each employee's performance, he did not seem to provide tactical coaching and skill development related to the job. Part of the reason may be related to the fact that participants performed different job duties and occasionally focused on sales. We did not find evidence that sales employees received tactical coaching outside of the sales office that involved direct observation and feedback.

The owner's ability to incite action without providing goals and metrics to gauge progress resulted in chaos and stress. One employee best summarized the leader's support absence of clear goals, which created anxiety and stress:

The biggest visionary. He's kind of got an entrepreneurial spirit, which might also contribute to the chaos. He's extremely—you know—he has great ideas. He has this really great ability to get people excited about anything. He could get Eskimos excited about the snow. And so, from a direct report standpoint, he was really good at coming in and kind of reviving the team on those discouraging days. With that came a lot, because he's an ideas man, and that was challenging. Sometimes you were chasing the idea, and it was like, well, that's not working, let's do this, you know. But because he had that, he was very hands-on, very involved, and very much wanted to make things succeed. There was that kind of support that I talked about.

Here she describes the high level of support and the chaos that ensues if not coupled with clear roles, expectations, and goals.

Another employee added more context regarding the work environment created by charismatic leaders who did not provide clear direction and targets besides the ambiguous notion to grow the business. She painted the work environment as:

Supportive and also challenging. I mean, more challenging, like, always focused on growth to the point where I don't want to say I didn't feel safe like that's a scary thing, but like you cannot trust, you can't relax, you always have to be growing doing. There was like so much pressure...it got to a point, like God, stop, can we breathe?

The one case where we found role clarity and excellent sales performance involved a sales employee who has a sales job title and clear description and is paid strictly on commission. He was the only employee we found paid on commission, which serves as a performance metric in place of sales goals and targets. Darrat et al. (2021) and Kurdian (2021) found that commission-based pay provides role clarity because it acts as a sales goal that motivates a sales employee to identify the behaviors that drive performance. As we previously stated, it would be difficult to provide role clarity without clearly defined roles.

Although the owner tailored job titles to what intrigued the employee, their job descriptions also seemed unclear, which caused role conflict. One employee shared, "We had almost no one that was working full-time for Dale Carnegie, as a trainer. So, you had to find someone that could do a noon lunch-and-learn for your client, and that got very chaotic."

Throughout the literature, we found that role conflict corresponded to job stress, lower performance, and turnover (Barksdale et al., 2003; Dubinsky et al., 1986). At the heart of role

conflict is a lack of role clarity, which constituted 25% of all comments related to reasons for leaving. Role clarity involves more than a bulleted job description; it entails the specific actions and behaviors that lead to meeting performance standards, which stem from specific goals (Menguc et al., 2007).

The owner had high expectations that were not grounded in a clear path forward with established milestones that indicated progress both individually and collectively. He recognized that he did not fully understand his role when he purchased the business, which was evident in how he scored himself the lowest of all participants (1 out of 5) on the RJP question that stated, “Based on your knowledge of the role at DC, how accurate was what you were told about your position before starting and during your initial training?” He believed that he could drive results and tried multiple strategies to jumpstart sales. Interestingly, even after 10 years as the owner, he still considers the salesperson role not that difficult, rating the difficulty of the job 2 out of 5, the lowest among all participants in the study.

Combine his incorrect and vague growth expectations, ability to inspire action, a perception that the sales role is not that difficult, ambiguous role definitions, lack of clear sales goals, and a demotivating and confusing compensation plan, and it's not surprising that DCT-DFW lost sales employees, resulting in 69% turnover rate within the employee's first year.

Recommendations

Socialization

Because there was a disconnect between local branches and national headquarters, DC&A (National) should design a better training and onboarding experience by partnering with local branch owners. The national brand and branch owner did not coordinate their efforts to

upskill sales employees. DC&A should also provide tactical sales training in addition to courses that center on holistic human development. We realize the sales of prospecting may look different based on location, but there are universal principles that apply to each branch, and DC&A could provide more targeted resources specifically for sales performance. We feel DC&A should establish milestones, compensation guidelines, and realistic growth models to help owners build their businesses. The owner did not receive clear direction from DC&A and had full control over running the business. DC&A only provided negative consequences that elevate stress because it limited autonomy. Therefore, an owner cannot go into debt to grow their branch, but they do have the authority to make hiring and compensation decisions. We found that unless an owner understands the Dale Carnegie infrastructure, culture, and expectations, they may force changes on a branch that are unrealistic and lead to confusion, stress, and chaos.

Our evidence showed us that there was a lack of role clarity emanating from the owner who did not have a RJP and failed to recognize the difficulty of the sales role. The compensation structure reflected this perception. Owners should be familiar with and identify with the Dale Carnegie mission and have a connection with the organization. In our internal research, the most successful owners climbed through the organization and were experts on the training curricula. We strongly recommend providing a career path for sales employees to become owners.

DCT-DFW should identify job candidates who have a personal connection to the organization, or a passion for what the organization provides. They should have a passion for training and a desire to become a trainer to better understand how to sell the service they represent. Retention was higher among the employees who had an affinity for training first and

sales second. Finding those who have an affection for what Dale Carnegie provides, challenges socialization models and should be considered in future socialization research.

Compensation

Our research question asks if there is a relationship between retention and how DCT-DFW has compensated new sales employees. We found that compensation negatively impacted retention based on survey and interview results, as discussed earlier in the findings section of this paper.

Specifically, participants stated during interviews and in open-response survey questions that the compensation was too low and it took too long to earn any bonus or commission due to the long sales cycle. A healthy sales compensation plan should allow 80 to 85% of the sales force to receive some incentive (Colt, 1998, p. 46). Our document review revealed that 19 salespeople from 2012 to 2022 received the base salary plus commissions compensation plan, and the standard base pay was \$46,000 annually. The standard commission was 15% of sales above a monthly threshold of \$17,500. As previously mentioned, only 31% of the 19 salespeople earned a commission during this period, and 84% left the company within two years of their start date. Therefore, the obvious recommendation for DCT-DFW is to adjust the salesperson base pay and commission structure to a level that rewards accomplishments, makes the sales representative work smarter, attracts and retains talent, and encourages underperforming talent to leave the company (Colt, 1998).

Coincidentally, the executive vice president of operations at DCT-DFW recently adjusted the salesperson base salary plus commission compensation plan, increasing the base pay to \$60,000 annually, eliminating the minimum monthly threshold, and adding a two-tiered

commission structure based on tenure. Salespersons with less than one year of service earn a 10% commission on sales, and those with a year or more earn a 15% commission on sales.

	Base Salary	Annual Sales	Commission %	Actual Commission	Monthly Threshold	Threshold Achieved (Y/N)	Total Comp	Base Pay Split	Commission Split
Old Plan	\$48,000	\$142,133	15%	\$21,320	\$17,500	N	\$48,000	100%	0%
New Plan	\$60,000	\$142,133	15%	\$21,320	\$0	N/A	\$81,320	74%	26%

The figure above shows the impact of this change when compared to the old base salary plus commission plan. The change represents a 69% increase in total compensation and a 74:26 salary-to-commission ratio. The average salary-to-commission ratio in U.S. sales forces is 60:40 but may vary based on the product sold (Patel, 2021).

A limitation regarding this recommendation is that lowering the performance effort may cause the company to lose high-performing salespeople. A study by Ho, Le, and Wu (2009) measured the impact of a compensation plan that changed from a high to a less performance-sensitive structure and found that the less performance-sensitive compensation plan attracted underperformers and retained fewer high-performing salespeople. The example suggests that there may be an opportunity for DCT-DFW to adjust the compensation plan further to include additional performance-based activities to balance the salary-to-commission ratio and to ensure it does not attract or retain underperforming sales talent. Adding a tiered commission plan where the commission rate increases based on higher performance may appeal to high performers.

Another recommendation based on the findings is to allow salespeople to choose a compensation plan that aligns with their experience and confidence in their ability to sell. According to Roberts and Chonko (1996), satisfaction with pay is the most significant predictor of salesperson turnover. Additionally, a study by Fahr et al. (1989) found that more experienced and confident salespeople chose commission-only compensation plans, and the less experienced

individuals chose the combination of a base salary plus commission. Therefore, allowing experienced salespeople to choose a commission-only plan with a higher commission rate may be more appealing to them, and allowing a less confident and experienced salesperson to select a base salary plus commission plan that has a lower commission rate may be more attractive to them.

The final recommendation based on the findings is to create a compensation program overview document that clearly explains and identifies each compensation plan option and lists the pros and cons of each option based on the realities of the DCT-DFW sales environment. As mentioned previously, the gap between the difficulty of the work and compensation gives rise to unmet expectations that often lead to sales force turnover (Darrat et al., 2021; Lopez et al., 2006). Therefore, this is a tool that hiring managers should use to thoroughly explain how the compensation plan works, which helps provide a realistic preview during the recruiting process and additional role clarity during onboarding.

Leader Support

We recommend that DCT-DFW hire people who have had a positive personal experience with the brand, are in alignment with its principles, and have a passion to train or sell its offerings. This may seem at odds with comments regarding role clarity, but we attribute a lack of role clarity to unclear goals and a lack of tactical sales coaching. Couple these facts with aggressive growth strategies and low compensation, and stress abounds. No one seemed confused about how to train or the timeline to succeed as a trainer. Similarly, we also recommend that Dale Carnegie find owners who want to promulgate and perpetuate its mission: "to provide people everywhere with better, richer, more fulfilling relationships and a better way

of life - both professionally and personally” (www.dalecarnegie.com). We found that owners who ran a successful branch rose through the ranks and had a clear understanding of the company, business, and role. They had committed to Dale Carnegie’s mission and were very involved in every aspect of the business. The distant owner model does not work, and the DCT-DFW owner resisted running the day-to-day business. He expected that he could infuse and ignite sales in a culture that cared more about community and relationships than making money. For a training organization, DC&A paradoxically did not provide an owner's manual or training on how to run a franchise.

The current structure benefits an owner who has years of experience training and selling DCT’s services and shares its values. Future owners should not try to swim against the current. Instead, they should alter their earnings expectations in an effort to operate a successful DCT branch. In the short time spent studying the DFW branch, we witnessed the owner capitulate the culture current and hand over the reins to an employee who aligns with the DCT mission. The branch incrementally changed course by limiting expenses and slowly growing or adding new clients. The culture is people-centric, and they admittedly do not care about revenue; they focus on building relationships. We recommend that the current owner continue to surrender and change his expectations instead of exploring new strategies to stimulate and fertilize growth.

Conclusion

Dale Carnegie is well known as a premier training organization based on the perennial classic and self-help staple, *How to Win Friends and Influence People*. It was evident that employees who were attracted to working for DC and stayed longer had a personal connection to the Dale Carnegie brand and the curriculum that transforms lives. It is a training organization

designed to produce world-class leaders and training experiences and attracts people who share that same vision.

We found that people who thrive at Dale Carnegie made a concession to living for a purpose over pay, and trying to swim against this tide is frivolous. The majority of those hired to sell seemed more passionate about becoming world-class trainers. Interestingly, these individuals persisted much longer in the sales role than their counterparts who were more interested in making a lucrative career selling.

DCT's structure is not built to produce sales and generate profit; its "true north" is to unlock people's potential, and it is possible that changing the DC mission to a growth model threatens the timeless principles upon which it is built. As a private company, we did not sense or discover a high-growth organization committed to hitting quarterly and annual financial targets. Those drawn to Dale Carnegie were first attracted to the organization because of its altruistic mission to change lives and therefore should reinforce the themes that support this cause.

We found the Barksdale et al. (2003) socialization model applicable and illuminating. The socialization sequence starting with RJP through affective commitment seemed to hold water. We theorized that the socialization model for sales employees could be enhanced by a motivating compensation plan and leader support, and we confirmed our hypothesis. Socialization by itself does impact retention, but combined with a tailored pay structure and a leader who provides individualized consideration, it improves retention. We argue that these elements should be baked into a socialization framework and deserve more investigation.

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Appendix

A. Literature Search Methods

The research team utilized the Rapid Evidence Assessment (REA) method to search for relevant studies based on the following questions:

1. What is known in the scientific literature about socialization's impact on retaining salespeople?
2. What is known in the scientific literature about culture's impact on retaining salespeople?
3. What is known in the scientific literature about compensation's impact on the retention of salespeople?
4. What is known in scientific literature about early success's impact on retaining salespeople?
5. What is known in scientific literature about the impact that onboarding has on retaining salespeople?
6. What does the scientific literature say are factors that affect company commitment and longevity?
7. What role does the supervisor play in determining a new hire's desire to stay?
8. How does the perceived support of the supervisor (PSS) affect new hire retention?

As a part of this inquiry, we searched Google Scholar and Vanderbilt Library to identify relevant studies. In addition, we applied scholarly journals and peer-reviewed as general filters during the search.

We also searched for articles using a combination of different terms, socialization, social learning theory, intrinsic motivation, extrinsic motivation, perceived supervisor support (PSS),

perceived organizational support (POS), retaining salespeople, retaining committed salespeople, retaining talent, retention, the impact of culture on retention, the impact of onboarding on retention, the impact of compensation on retention, and the impact of early success on culture.

The search for articles also includes screening the reference section of relevant studies to identify additional articles.

Inclusion Criteria

The inclusion criteria include dates published in the period 1975 to 2022 for meta-analysis and the period of 1962 to 2022 for primary studies. The search also included articles published in English; the types of study included were quantitative, qualitative, and peer-reviewed. The study design searched included meta-analysis and controlled studies. We narrowed down the studies by focusing on articles relevant to the sales profession. Lastly, we used the Population, Intervention, Comparison, Outcome, and Context (PICOC) method to assist in searching for studies that are relevant to the professional context description. For this search, the population is salespeople. The intervention is onboarding, coaching, compensation, culture, values congruence, and early success. The outcome is the retention of the sales workforce. And finally, the context is focused on providers of professional training services struggling to retain salespeople.

Synthesis of Literature

The literature on the subject of retention of salespeople is expansive and offers a variety of reasons that turnover occurs.

B. Email Invitation to Participants

Subject: Vanderbilt Study on Dale Carnegie

Dear (insert name),

We are contacting you because you worked for Dale Carnegie, and we want to learn about your experience. As Vanderbilt doctoral students, we are conducting research with a Dale Carnegie franchise to improve sales employee retention. This study is confidential: your name and personal information will not be used in any reports shared with Dale Carnegie or anyone outside of the research team.

Participants who complete two tasks will be gifted up to a \$100 gift card as an appreciation for their time. The first \$25 is available for participants willing to take this short (approx. 10 min) [survey](#) by October 30th. The remaining \$75 is available to people who participate in a 30-minute interview with one of three Vanderbilt student researchers on the research team.

Your participation is completely voluntary, and you can stop participating at any time.

Please indicate if you're willing to do an interview by responding to this email or let us know if you have additional questions related to this project by October 30th. The research team's professional information and contact information is listed at the bottom of this email.

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C. Follow up email to Participants.

If you haven't already, please take this short (10 min) survey about your experience working for Dale Carnegie.

We are doctoral students at Vanderbilt studying salesperson retention and our capstone project involves working with Dale Carnegie.

Your name was provided as a former sales representative at Dale Carnegie, and we need your insights in addition to filling out the survey.

We would be willing to give you a \$100 gift card for participating in a 30-minute follow-up interview with us. Your identity would remain strictly confidential, and your participation is completely voluntary.

Please indicate your willingness to participate in a 30-minute interview by responding to this email.

Thank you!

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D. Survey ([survey](#))

Vanderbilt Study on Dale Carnegie

Thank you for participating in a Vanderbilt study on employee retention at Dale Carnegie. Please take this 10-min survey based on your experience as a former Dale Carnegie sales employee.

Your participation is voluntary and you may opt out of the survey at any time. Your responses and identity will be confidential.

Thank you in advance for your contribution!

taufiqjiwani@gmail.com [Switch account](#) 

* Required

Email *

Your email

When did you start working at Dale Carnegie (DC)?

Your answer

Thank you for participating in a study on employee retention for Dale Carnegie. Please take this survey based on your experience as a former Dale Carnegie sales employee.

Your participation is voluntary, and you may opt out of the survey at any time. Your responses and identity will be confidential.

Background Questions

When did you start working at Dale Carnegie (DC)?
How long did you work for DC?

Realistic Job Preview (RJP) Question

Based on your knowledge of your current role, how accurate was what you were told about your position before starting and during your initial training?"

very inaccurate somewhat inaccurate neither accurate nor inaccurate
somewhat accurate very accurate

Job and Pay Expectations

Rate each of the following statements according to how much you agree or disagree.

Strongly Disagree Disagree Neither Disagree nor Agree Agree Strongly Agree

I consider the role as a salesperson at DCT extremely difficult
The pay matched the degree of difficulty of the job
My experience doing the job matched how the job was described to me when I interviewed
I felt motivated by the pay structure

Role Clarity

Rate each of the following statements according to how much you agree or disagree.

Strongly Disagree Disagree Neither Disagree nor Agree Agree Strongly Agree

I knew exactly what was expected of me.
I had a clear-cut authority to accomplish the tasks required of me.

I knew exactly what my supervisor expected of me.
My role as a salesperson was clearly explained to me.

Task-Specific Self-esteem

Based on the experience you had in your role as a salesperson, rate how satisfied you were with your own performance.

Never sometimes often quite frequently always

Prospecting
Fact-finding and needs analysis
Selling/closing
Planning/goal setting
Personal/professional development

Relationships

Rate each of the following statements according to how much you agree or disagree.

Strongly Disagree Disagree Neither Disagree nor Agree Agree Strongly Agree

I felt personally connected to the other employees
The employees made me feel welcomed when I joined
I felt comfortable approaching other employees if I had a question

Training

Using the scale below, how would you rate the training you received in each of the following areas?

(did not receive training)
very poor poor neutral/unsure good very good

Activity plans and review
Account preparation and review
Weekly sales meetings
Role-playing
Joint calls
Selling skills
Technical systems/tools

I felt my direct supervisor considered my personal feelings before acting.
I felt my direct supervisor showed respect for my personal feelings.
My supervisor took the time often enough to talk about my progress on the job.
My supervisor frequently checked in to see how I was doing.

Short Answer

Why did you decide to accept the job at DC?
What would have caused you to stay at DC?
What caused you to quit?
What advice would you give to DC to improve salesperson retention?

Please let us know if you would be willing to speak with us about your experience by providing your contact information: _____

E. Interview Protocol

Data collection for this study includes using interviews as a research tool to understand the phenomenon better. In addition, we will use purposive and snowball sampling methods to select current and former sales professionals of the Dale Carnegie Dallas Fort Worth (DFW) location.

The interviewer will conduct a semi-structured interview consisting of open-ended questions over the phone or online using Zoom or Microsoft Teams to generate meaningful conversation and to help understand the participant's experiences while working at Dale Carnegie DFW. Lastly, we will ask probing follow-up questions when necessary to get the participant to provide more specific examples of their experience.

F. Interview Email

Dear XXXX,

Thank you for completing the Vanderbilt Study on Dale Carnegie Survey and agreeing to participate in a follow-up interview. As a reminder, we are conducting research with a Dale Carnegie franchise to improve sales employee retention. This study is confidential, so we will not disclose your name and personal information in any reports shared with Dale Carnegie or anyone outside the research team. The interview will take place virtually utilizing zoom and will last approximately 30 minutes.

I have the following time slots available to conduct the interview (all times are eastern standard time):

Date: XX; Time: XX:XX

Let me know which date and time slot above works with your schedule, and I will send you an email confirming the time along with a virtual meeting link to join my zoom meeting.

I look forward to speaking with you. Let me know if you have any questions.

G. Draft Script

Good morning/afternoon/evening. I appreciate you taking time from your busy schedule to participate in our research project.

As I mentioned in the invitation, I am a graduate student at Vanderbilt University Peabody College. My research partners and I are enrolled in the Doctor of Education in Leadership and Learning in Organizations degree program. We are completing our final capstone project, which requires us to work with an organization to help solve a problem of practice they are experiencing within the company. As a result, we partnered with your current/former employer Dale Carnegie to help them understand why salespeople leave the company. We are focusing our study on current and former employees like yourself.

Your participation in the study is entirely voluntary, which means you may choose to disengage in this conversation at any point in the process. I will report the findings of this study in the aggregate and will maintain confidentiality and protect your identity by using only pseudonyms and not disclosing the names of anyone who participated in these interviews. I will follow up with a thank you email and include my contact information and the Vanderbilt Institutional Review Board contact information in case you have additional questions about this study.

Let me know if you have any questions before we begin.

H. Interview Questions

Essential Questions:

1. If you could characterize your experience working for Dale Carnegie in a word, what would it be? Tell me more about that.

2. How well did your experience working at DC match the expectations you were given at hiring?
3. How satisfied were you with the compensation, Benefits, perks, and incentives that were offered to you? Tell me what impact, if any, this had on your reason for leaving the company.
4. Tell me about any training you received from Dale Carnegie that was supportive in doing your job.
5. How would you describe your relationship with your direct supervisor?
6. Based on the way things were when you left, what would have to change for you to consider returning to the sales role at the company?

I. Coding Booklet

Abbreviated codes

Codes for people leaving (attrition):

- Realistic Job Preview = (RJP)
- Role Clarity = (RC)
- Perception of Training = (T)
- Task Specific Self Esteem = (SE)
- Job Stress = (JS)
- Performance = (P)
- Compensation = (C)
- Satisfaction w/ Organization = (SWO)
- Affective Commitment = (AC)
- Leadership Support = (LS)
- Other = (O)

Codes for people staying (retention):

- Realistic Job Preview = (rRJP)
- Role Clarity = (rRC)
- Perception of Training = (rT)
- Task Specific Self Esteem (rSE)

Job Stress = (rJS)
Performance = (rP)
Compensation = (rCr)
Satisfaction w/ Organization = (rSWO)
Affective Commitment = (rAC)
Leadership Support = (rLS)
Other = (rO)

Definitions

Realistic Job Preview (RJP) - How well the job description, as it was explained before the employee's hire date, matched the reality of the job.

Role Clarity (RC) - How well the job was explained and how much authority they had to do the job after they were hired. Pertains to confusion due to a lack of alignment and clarity among leaders and encompasses the difficulty and hardships associated with the job. Examples correspond to ambiguity around goals, milestones, and metrics and how to execute the job. Barksdale defines role clarity as the “explicit or implicit agreement with the work group that articulates what tasks recruits are to perform, what the priorities of the tasks are, and how recruits should allocate their time among the tasks.” (Barksdale, 2013).

Perception of Training (T) - How well the training prepared the person for the job.

Task Specific Self Esteem (SE) - “Refers to an employee’s feelings of competence in performing job-related tasks” - Barksdale (2013)

Job Stress (JS) - The perceived apprehension, pressure, or worry about doing the job. Job stress also links to conflict.

Performance (P) - “Relates to the accomplishment of job-related tasks.” Barksdale (2013)

***Compensation (C)** - Any mention of money and how compensation connected to attrition. This will also include comments that compare the actual compensation versus what they expected.

Satisfaction w/ Organization (SWO) - The overall satisfaction with the organization, but not related to their specific sales role. This includes positive comments about how the organization selected its leaders.

Affective Commitment (AC) - How they identify with the organization’s values, brand, and identity.

***Leadership Support (LS)** - How much support they received from Leadership (including their direct manager).

Other (O) - Other themes not already mentioned that contributed to quitting.

***Indicates topics or themes not included in Barksdale's (2013) study.**

Rules

Each coder will watch or listen to the interview before coding the interview transcription.

Each coder will add, in the body/text of the interview, an abbreviation each time a theme is mentioned in the interview, including the parentheses. The coder should read and code the text two times.

There may be multiple codes in one sentence depending on the number of times a topic was mentioned or if a topic was inferred. Each code abbreviation will be independently separated using the parentheses to help count the number of abbreviations (rT) (SE) (RJP).

The coders will add the number of times each abbreviation code is inserted throughout the text. They will input this total in the table above and by interview.

If a theme falls outside of the 9 themes, the coder will label that phrase or sentence with (O) - Other, indicating the researchers will need to revisit those sections to determine if a new theme is warranted.

For example:

Well, you're caring if you're selling a non tangible, you're selling a result. That has not happened yet, and that there really is no guarantee (JS). And so you know, of course, it's at a cost to the company. And they're saying we will prove that this is going to work before we spend the 10s of 1000s of dollars program (JS). So it felt a lot you were really it was an interesting sell cycle was interesting sell unique and then for our I think it was really our particular franchise and I don't need to go into a lot of it (SWO). I think there was a lot of turnover, which is probably good while you all are doing this. And so I felt a little like it was a moving target constantly as to you know, what is success (RC)? What isn't what are we looking for (RC)? What's our goal (RC)? So it always felt like we were just in my personal opinion, only for myself was helpful. Like I was always one step behind as the salesperson speak to sales (SE). Yeah

Count in this paragraph:

(RC) - 3

(JS) - 2

(SE) - 1

(SWO) - 1

Practice Paragraph:

It sounds it's always hard to know if you're going to sell real ever in your career (JS) (SE). Working commissioned is not easy (JS) (SE). If I I don't know. Early on when I started there was a quite a bit more resources for salespeople. There was a really nice sales onboarding training through Dale Carnegie corporate that I attended in person that I thought it was a really, really well rounded program. And then because I was part of a very small group, I I personally got a lot of one on one attention from some of the more experienced cells. There's two experienced cells guys in our group and then the owner so it was very easy, I think for me to acclimate (SE). I had a lot of help. I had someone at every meeting was really steady. And then as we tried to expand, I don't know that there was always opportunities to get new salespeople through the program very fast. Then there they started handling all of the the internet leads coming in (JS). So then you move just a corporate, I think it just if I had to put my finger on it, I think it's just growth without enough structure and support in app growth (T) (SE) (LS). Whether or not that was intentional is how it happened.

Count in this paragraph:

(LS) - 1

(T) - 1

(SE) - 4

J. Coding Results (attrition-based comments)

	Taufiq	Roz	David	Agreement
Realistic Job Preview (RJP)	6	8	24	38
Role Clarity (RC)	43	28	54	125
Perception of Training (T)	0	7	3	10
Task Specific Self Esteem (SE)	7	10	10	27
Job Stress (JS)	39	26	34	99
Performance (P)	3	9	3	15
Compensation (C)	29	24	29	82
Satisfaction w/ Organization (SWO)	0	19	11	30
Affective Commitment (AC)	3	9	3	15
Leadership Support (LS)	3	20	18	41
Other (O)	7	7	10	24
			Cronbach Alpha	0.91

K. Coding Results (retention-based comments)

	Taufiq	Roz	David	Total
Realistic Job Preview (rRJP)	15	11	19	45
Role Clarity (rRC)	0	1	17	18
Perception of Training (rT)	23	26	32	81
Task Specific Self Esteem (rSE)	20	11	25	56
Job Stress (rJS)	0	1	8	9
Performance (rP)	0	3	4	7
Compensation (rCr)	4	15	11	30
Satisfaction w/ Organization (rSWO)	5	1	6	12
Affective Commitment (rAC)	13	15	14	42
Leadership Support (rLS)	41	28	38	107
Other (rO)	0	0	9	9
			Cronbach Alpha	0.95