

INFORMATION QUALITY IN COMPLEX SALES

INCREASING SALES PROPOSAL INFORMATION QUALITY THROUGH CORRESPONDING CUSTOMER ACCOUNT PLAN ELEMENTS

(Research Paper)

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Abstract: This paper highlights an area where the quality of information, beyond the quality of data, is of critical importance for business success. The quality of sales information can be the determining factor between winning and losing accounts. In complex sales, sales proposals must meet the information needs of multiple decision makers at multiple levels of the prospect's organization. Sales proposals are a key information product within the complex sales process. Creating sales proposals with high information quality can be contingent on the information quality of another information product, the customer account plan. Therefore, account plans should evolve to include elements that contribute to the information quality of sales proposals. The interdependence between the qualities of these two information products is developed in this paper. The paper builds on the research findings by matching IQ criteria with sales proposal and account plan elements. It is based on the sales information quality analysis of five companies leading in their respective industries.

Key Words: Complex Sales, Sales Proposal, Account Plan, Sales Information Quality

INTRODUCTION

In complex sales, where the purchasing process requires multiple decision makers at multiple levels of the organization, sales information, e.g. proposal documents, must meet a large variety of information needs. Information quality (IQ) is essential in a sales proposal for a complex sale because if the seller is not completely understood, purchase decision makers will not respond and revenues will be lost. The purpose of this paper is to show how strategically linking sales proposal IQ dimensions, or attributes, with account plan elements can improve the IQ of sales proposals and increases the success rate for winning complex sales. The paper also shows that the current focus of information quality research on databases can be extended to such information products as sales documentation, employing a framework that was originally developed for the database context.

METHODS

To support this exploratory research paper, a pilot study was conducted involving five cross-industry interviews with marketing and sales managers responsible for complex sales at leading telecommunication, computer software, computer hardware, pharmaceutical and reinsurance companies. The five interviews were conducted in Switzerland and Germany, from November to December 2003. Each interview was personal and lasted for approximately two hours. Samples of interviewees' actual sales proposals and account plans were also analyzed. These results also contributed to the IQ elements listed and defined within the tables in this paper. Based on the topics presented by the interviewed managers, we have categorized the most relevant sales proposal elements with the help of a data quality framework. Below are interviewees' main common and individual findings. The results support the important need to explore a new application field for information quality thinking: sales proposal information. They also highlight important insight into the quality management of interdependent information products.

PURPOSE AND RATIONALE

All five interviewees commonly agreed that delivering sales proposals of poor IQ prevents sales. They gave the delivery of sales proposals with high IQ the highest rating of importance. Interviewees unanimously stated that those sales professionals who create high quality information are the most successful. However, in these companies there is almost no attempt to systematically transfer, via training, these winning skills to all sales team members and to make the dimensions of high quality sales proposals explicit. As a main finding of these first exploratory interviews, interviewees do not fully recognize the many dimensions of information, or the potential application of these dimensions to improve sales IQ. They do agree, however, that improving sales IQ is a business opportunity and priority.

The following individual findings describe what interviewees consider to be the main information deficiencies (see Table 1) in their sales proposals and how they can be improved (see the section on results).

Industry	Information Deficiency
Telecommunication	Missing industry trends and missing overviews on past purchase activities
Computer Software	Lacking aggregation of standard sections, missing visualization elements
Computer Hardware	Inconsistent or incomplete cost / benefit analysis, missing customized solution details
Pharmaceutical	Missing pharmaco-economics, e.g. year / life costs, customer order details
Reinsurance	Inadequate situation and solution overviews, too many non-informative standard elements, e.g. company background and generic solution statements

Table 1. Deficient Information in Sales Proposals as Identified by Five Marketing and Sales Managers in Five Industries

In addition to these industry-specific information deficiencies, the interviewed marketing and sales managers also mentioned several typical IQ problems, such as timeliness, completeness, versioning, consistency, and correctness. To assist managers and their sales professionals increase sales documentation IQ we have developed IQ elements, based on an existing data quality framework, for sales proposals and linked them to sales IQ dimensions. This will help to meet sales proposal IQ criteria more consistently and to reduce the deficits identified by the interviewees, further increasing the fitness for use of sales proposals.

BACKGROUND

In this section, we briefly define some of the main terms discussed in this paper to familiarize non-sales specialists with this application domain of information quality management. This provides the necessary background for the further analysis in this paper.

Complex sales have generally longer sales cycles and require multiple decisions made by people at multiple levels of power and influence, each of whom approaches the purchase from his or her own perspective. Since larger sales are often integrated into prospects' project management processes, the complex sale goes beyond selling by supporting decision-making and change processes within the prospect's organization. Sales IQ supports the purchase decision criteria throughout the entire complex sales process [13, p. 11].

A *sales proposal*, or offer, is a critical information product that includes all the important decision-making issues that have been communicated and agreed on with the prospect. It leads decision makers along a communication path that includes the problem definition, solution / decision criteria, expected results, and purchase benefits. All organizations have their own language. There are special phrases and symbols that make sense to, and strike chords in, the people at work within them. Therefore, successful proposals echo the prospect's unique business and cultural voice [13, p. 152].

An *account plan* is an information product, as well as an information-gathering tool, used to develop complex sales. It is an internal repository, e.g. template or database, that holds the latest customer and prospect sales information. The account plan is used to identify and track extensive information on the prospect as well as to communicate important business development issues with sales and marketing management. After the marketing, sales and territory plans, the account plan is the last document in a company's sales channel strategy [4, pp. 41-42]. Account plans are often integrated into Customer Relationship Management systems.

Sales information quality is the characteristic of information exchanged in the sales process to be 'fit for use' for a purchase decision maker [10, p. 43]. Sales information quality in complex sales, therefore, is the quality of a sales document being 'fit for use' for multiple decision makers at multiple levels of responsibility having a variety of decision-making styles and business agendas. It could be reasoned that companies with high sales IQ will win sales more consistently and reduce the risk of unexpectedly losing sales due to poor sales IQ. In the context of marketing and customer service, the complex sales process consists of the following five main steps [2, pp. 25-26].

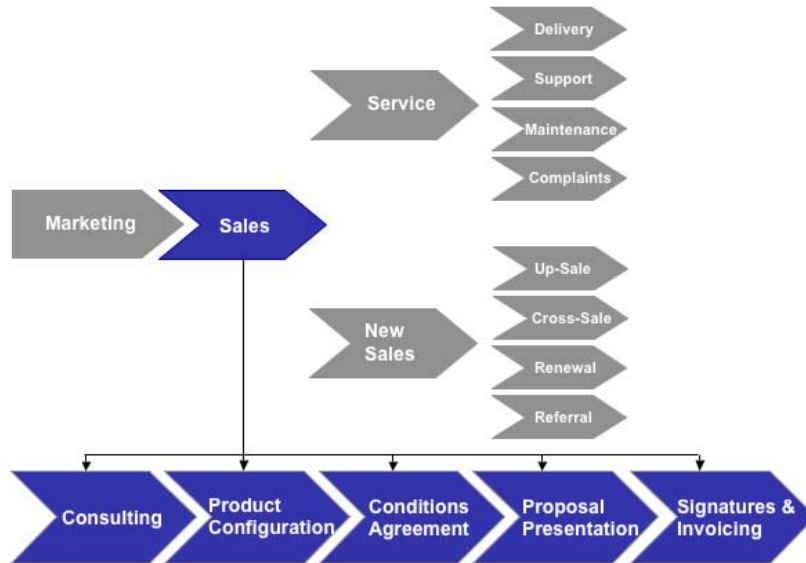


Figure 1. The Complex Sales Process

1. **Consulting** – the sales professional establishes the business relationship in three communication perspectives: 1. problem identification in financial terms. 2. problem solution, and 3. best single source provider for the problem-solving project [8, pp. 23-24].
2. **Product / Service Configuration** – the sales professional proves to the prospect that a solution can be delivered meeting the purchase requirements
3. **Conditions Agreement** –through negotiation, the prospect agrees to the solution delivery terms
4. **Proposal Presentation** – the agreed-upon solution and delivery conditions are formalized in a sales proposal and presented to the prospect
5. **Signature / Invoicing** – the proposal is approved and signed by the prospect, who then becomes the customer; invoicing follows

Our focus in this paper is on the actual *sales proposal document* that is communicated in the fourth step of the complex sales process, Proposal Presentation. The dimensions and elements that contribute to the quality of such a sales proposal are discussed in the next section.

RESULTS: ANALYZING SALES PROPOSAL INFORMATION QUALITY USING A DATA QUALITY FRAMEWORK

Based on the below categories and dimensions of a data quality (DQ) framework [12], generic, cross-industry IQ elements have been created for application in sales proposal documentation.

Category	Dimension
1. Intrinsic	Accuracy, Objectivity, Believability, Reputation
2. Accessibility	Accessibility, Access security
3. Contextual	Relevancy, Value-Added, Timeliness, Completeness, Amount of data
4. Representational	Interpretability, Ease of understanding, Concise, Consistent

Table 2. Generic DQ Categories and Dimensions [12]

Generic Sales Proposal IQ Category Tables

The following three category tables define the: 1. intrinsic, 3. contextual and 4. representational IQ categories in a generic sales proposal for a complex sale. They contain the recognized IQ dimensions with our developed IQ elements. We believe that for the IQ category 2. accessibility, sales information accessibility does not play a critical role in creating quality sales information, since this is the single category of quality provided by the prospect. Once the sales proposal is delivered, it is the prospect's responsibility to ensure that all those involved in the purchase decision-making process have proper access and security rights to the sales proposal.

Sources for the elements in these tables include empirical evidence from the researched sales proposals (telecommunication, computer software and pharmaceutical industry research participants), document design guidelines [7], a standard sales proposal format [4, p. 173], opinions from sales professionals, information quality frameworks [1] and [6, pp. 287-291], as well as knowledge visualization guidelines [5]. The dimensions and elements are, as far as possible, mutually exclusive and collectively exhaustive [11].

Dimensions	Elements	Comments
Accuracy	Author(s)	Name, responsibility, contact details
	Date(s)	Shows document creation and history (including date of expiry)
	Title	Concise, descriptively recognizable and unique
	Peer Review	Information has been checked internally, i.e. others in a team
	Version(s)	Distinctive and logical (including changes/modifications)
Objectivity	Factual Information	Know-what, -where, -who, -when, i.e. data about the prospect
	Procedural Information	Know-how, i.e. how this sale and other sales will be made / delivered
	Reasoning Information	Know-why, -what if, experiences, i.e. why the sales will be beneficial for the buyer, e.g. objective reasons for choosing the supplier
Believability	Grammar	Correct use of grammar rules
	Spelling	No misspellings
	Terminology	Correct use of terms, i.e. confused decision makers cannot decide
	Voice	Use of prospect's unique business and cultural language, e.g. phrases, idioms, visions [18]
Reputation	Benchmarks	Shows more competence than competitors, e.g. awards, recognitions, market share
	References	Indicates competence based on past client experience

Table 3. IQ Category 1: Intrinsic Sales Proposal Elements and Their Relation to IQ Dimensions

Dimensions	Elements	Comments
Relevancy	Executive Summary	Condenses the document contents to its most pertinent information
	Source Variety	Different sources of information to match the complexity of the solution offered
Value-Added	Credentials	Short expert profiles proving that the right people will provide the solution
	Market Analysis	Deep understanding of seller and prospect market conditions
	Orientation	Right people to benefit from solution
	Product Analysis	Deep understanding of seller's products and services and how they will best serve the prospect
	Prospect Analysis	Deep understanding of prospect's needs by relating proposal to prospects' products, customers, and purchase history
	Track Record	Background and experiences of past business relationship(s)
Timeliness	Current Trends	Latest information, e.g. industry trends
	Delivery Date	Meets prospect's decision deadlines
Completeness	Change Plan	Supports organizational change either by the nature of the solution or by implementing specific efforts, e.g. training
	Implementation Goals	Meets budget, time and quality requirements
	Investment Analytics	Cost / benefit analysis: return on investment, payback period, breakeven analysis, net present value, internal rate of return and economic value added [9, pp. 138-170]
	Price Structure	Meets cost expectations based on previous sales communication, i.e. no surprises
	Regulatory Information	Meets all industry and governmental requirements
	Risks Analysis	Potential financial losses from implementing and not implementing the solution, as well as the counter risk actions
	Signature Fields	Document(s) required for signatures, e.g. purchase order, work order, etc.
	Scope of Offer	Parameters of the product / service to be delivered Manages expectations of purchaser based on prior sales communication
	Solution Details	Products and services that will be delivered to the prospect
	Terms of Agreement	Legal and non-legal conditions, e.g. delivery, default penalties, third-party work, deadlines for acceptance, guarantees and warranties
Amount of Data	Dependent Documents	Minimize number of documents related to the proposal
	Number of Pages	Minimize proposal length, e.g. put the less critical information in the appendix

Table 4. IQ Category 3: Contextual Sales Proposal Elements and Their Relation to IQ Dimensions

Dimensions	Elements	Comments
Interpretability	Division / Department	Correctly portray regional / local identity standards
	Logic	Content flows from problem to solution to next steps
	Navigation	Managed by the Table of Contents
	Outline	Document consumable in the amount of time the decision makers have (usually relative to responsibility level)
Ease of Understanding	Diagrams	Shows planning, overview, clarification and prioritization
	Maps	Depicts location, relations and process / communication flow
	Metaphors	Creates concept associations and facilitates understanding by relating new concepts to those already known
Conciseness	Characters	Average number of characters per line, usually a maximum of 40-60 characters or 11-13 cm wide
	Lines	Average number of lines per paragraph, usually a maximum of 8-10
	Paragraphs	Average number of paragraphs per page, usually 3-6, but depends on the use of text and graphics
	Margins	Minimum of 2 cm minimum on all sides
Consistency	Visual Contrast	Information blocks are visually differentiated in a predictable manner
	Graphics	Use of lines drawings, photos, symbols where value is added
	Tables	Consistent shading, titling and line usage
	Glossary	Consistent use of terms, definitions and expressions
	Corporate Identity	Correct application of corporate identity standards

Table 5. IQ Category 4: Representational Sales Proposal Elements and Their Relation to IQ Dimensions

These Generic Sales Proposal IQ Category Tables can serve as checklists for sales proposal documents. For their real life application, however, company specific elements would have to be incorporated. In this format the tables are still too abstract for implementation. They can only be filled with more specific elements as the prospect's information preferences are identified, integrated, tracked and evaluated. How this can be done is described in the next section.

DISCUSSION: INTEGRATING SALES PROPOSAL IQ ELEMENTS INTO ACCOUNT PLANS

As defined earlier, the account plan is an information product, as well as an information-gathering tool, used to identify and track strategic sales information about the prospect. It is used at the beginning of the sales consulting sub-process [8, p. 50], and is populated during the entire five-step complex sales process (see Figure 1). Integrating sales proposal IQ elements into account plan elements will generate more complete information that will be more useful for prospect decision makers. As described in this section, this can be accomplished by creating sales proposals with a greater balance of information types and by evolving accounts plan fields to support sales proposal IQ elements.

Three Main Information Types Meet Decision Makers' Information Needs

In complex sales the multiple information needs and preferences of purchaser decision makers can be met through the strategic use of distinct types of information. The study by Williams and Miller (2002) on the decision-making styles of top managers supports the creation of quality sales information based on utilizing an appropriate weighting of information types [14]. Additionally, an information quality principle states that information can be separated into a three-fold distinction of *facts*, *processes* and *reasons* [10, pp. 95-96]. Restricting the main information types to these three distinctions makes this principle practical to work with for researchers as well as for sales professionals. The following table describes the three main types of information and their respective sub-categories as they relate to sales information.

Information Type	Sub-category	Description
Factual (know-what)	Know-where, -who, -when	data about the prospect – information on where the prospect is located, who the decision-makers are, etc.
Procedural (know-how)	None	how this sale and other sales will be made – describes the steps performed or required
Reasoning (know-why)	Know-what if	why the sale will be made – understanding concepts, circumstances, situations and experiences

Table 6. Information Types in Sales Information

Current Account Plan Elements

The following table lists current information elements generic to many account plans. Sources for these elements include empirical evidence from researched account plans (telecommunication, pharmaceutical and reinsurance industry research participants) and a standard account plan template [4, p. 61]. For sales IQ purposes, the following account plan elements are categorized into the three main information types.

Information Type	Account Plan Elements
Factual	<ul style="list-style-type: none"> • Account manager and account team • Advocate(s), opponent(s) • Credit risk • Current and previous sales professional responsible • Customer type • Direct purchaser • Executive management • Last management review • Prospect company and direct contact(s); • Purchase decision makers • Reference accounts • Relationship matrix of contacts • Sales goals including sales product(s), volume(s), percent of account's business and percent of overall yearly quota • Type, volume and locations of business
Procedural	<ul style="list-style-type: none"> • Customer relationship activities • Delivery schedules and deadlines • New business activities • Product / service delivery process • Prospect account strategy, product strategy

Information Type	Account Plan Elements
	<ul style="list-style-type: none"> • Prospect decision and approval process • Sales activities and contacts
Reasoning	<ul style="list-style-type: none"> • Account history – past sales including volumes and percentages, or sales attempts, problems and successes (can go back five years or more) • Competitor profiles and competitive advantages • Special purchasing conditions • SWOT (strengths, weaknesses, opportunities and threats) analysis of prospect needs versus sales portfolio

Table 7. Current Account Plan Elements

Evolved Account Plan as a Sales IQ Tool

Integrating sales IQ elements into current account plan elements reveals a functional benefit. The current account plan elements are strongly factual-information based, while the recommended additional elements derived from the sales proposal IQ elements are strongly procedural- and reasoning-information based. Therefore, integrating sales IQ elements into account plan elements supports the creation of sales proposals that have a greater balance of information types. As a result, these proposals will better meet the diverse information consumption needs of a wider variety of purchase decision-making styles.

Following is a sampling of evolved account plan elements based on the previously defined sales IQ elements. For sales professionals to successfully use the evolved account plan, elements are best supported by factual, procedural or reasoning information questions formulated to give prospects the greatest value. After each account plan element a link is made to the IQ dimension affected in the sales proposal (see Tables 3, 4 and 5).

Information Type	New Account Plan Element and Supporting Questions	IQ Dimension
Factual	Signature Fields – what are the documents required for signatures, e.g. purchase order, work order?	Completeness
	Current Trends – what industry trend information is most relevant for this prospect?	Timeliness
	Title – what is the uniquely descriptive and competitively distinctive name for this document?	Accuracy
Procedural	Change Plan – how can the prospect’s organizational change be supported?	Completeness
	Peer Review – how is the proposal reviewed for accuracy? Who already knows the prospective client and can review the proposal accordingly?	Accuracy
	Delivery Date – how will the proposal be developed in time to meet the delivery deadline?	Timeliness
	Prospect Analysis – how can the prospect’s expectations be managed?	Value-Added
	References – how have similar problems been solved?	Reputation
	Voice – how can the prospect’s unique language be used, e.g. their vision statements, standards, acronyms, idioms, manager and employee names, etc.?	Believability

Information Type	New Account Plan Element and Supporting Questions	IQ Dimension
	Visualization – how can diagrams, maps and metaphors be used?	Ease of Understanding
Reasoning	Benchmarks – why are we more competent to deliver the solution than our competitors?	Reputation
	Credentials – why do our people have the right credentials to provide the solution?	Value-Added
	Investment Analytics – why will this solution deliver financial benefits to the prospect, i.e. using cost / benefit analysis and other profitability measurements?	Completeness
	Scope of Offer – why does the solution meet the entire range of service, product and functional requirements?	Completeness
	Source Variety – why have different information sources been used to match the solution’s complexity?	Relevancy
	Terms of Agreement – why are our contractual conditions better for the prospect, i.e. a competitive advantage?	Completeness
	Track Record – why (and how) have we done business with this prospect in the past?	Value-Added

Table 8. Sample of Evolved Account Plan Elements Linked to Sales IQ Dimensions

Based on the evaluation of a sales team’s specific needs, their sales proposal IQ elements should be combined with their current account plan elements to create an evolved account plan that is optimally organized for team usage. For example, static and dynamic (rapidly changing) information can be separated for quick readability of recent changes. Additionally, the extra effort to obtain the IQ based account plan elements will require sales professionals to have more in-depth business relationships with their prospects and customers. Using the account plan to improve sales IQ also prevents additional documentation from creeping into the sales improvement process. This minimizes process change and increases the probability of faster integration into the sales team culture.

An example of how account plan elements can improve the information quality of sales proposals is the element of ‘Voice’ in Table 8. By adding a Voice field to the account plan the prospect’s specific language can be captured. This increases the probability of the prospect’s decision makers to identify with the proposal. It also increases the proposal’s believability since its content now reflects the words, expressions and concepts used by the prospect. In essence, the reading experience is that the seller understands the prospect and has already become part of the solution delivery process.

Another example of using account plan elements to improve the information quality of sales proposals is the element of ‘Visualization’, also found in Table 8. By adding a Visualization field the account plan can be used to guide the sales professional to best increase the proposal’s ease of understanding for a key decision maker. For example, decision trees, flow charts, tables, matrices, pie-, line- or bar charts, etc. can be used based on the prospect’s information needs and preferences. With the right visual in a proposal a prospect’s Project Manager, responsible to know all of the seller’s solution details, can easily show her Chief Financial Officer the benefits of the offer from just a financial perspective.

CONCLUSION: MAIN FINDINGS AND SUGGESTIONS FOR IMPLEMENTATION

A result of this paper is the creation of a link between sales proposal IQ elements and account plan elements to support the creation of successful sales proposals. In more general terms, we have argued that an information product's information quality can be critically dependent on that of another. Account plans provide an efficient way to improve sales proposal information quality. However, it seems that the quality dimensions of information and the interdependence between account plans and sales proposals are not yet fully recognized by marketing and sales managers. Our paper applies data quality dimensions to an information product beyond the database context and, with some interpretative liberty, proves this to be beneficial. If sales professionals are sensitized to the information needs and preferences of their prospects through required entry fields in the account plan, they will generate an IQ profile that can be used not only for one sales proposal, but for the ongoing need to deliver quality marketing and sales communication to the same organization.

Simply requiring sales professionals to compile their prospects' IQ criteria is not enough. They need to be properly trained to do so. In addition, the team's knowledge that supports the creation of quality sales information should be further developed. Defining and managing a competitive intelligence matrix supports this by mapping the three information types (factual, procedural, and reasoning) to the three types of relevant business knowledge:

1. **Product knowledge** – about the seller's company, products and services
2. **Market knowledge** – about the seller's and prospect's competitive, regulatory and socioeconomic environment
3. **Customer knowledge** – about the prospect's products, customers, business, decision makers and purchase history

Training should be designed to ensure that sales professionals spend as little time away from their core sales activities as possible. In addition, sales professionals responsible for complex sales usually have a high degree of experience. For these two reasons, recommended is a guided-discovery training format that focuses on solving business cases by providing experiences leading to the discovery of insights and skills [3, pp. 178-179]. Early on, sales team members should be given the challenge of solving real sales cases by defining the IQ categories, dimensions and elements needed to best support their prospect's decision-making needs. In such trainings, the following instructional sequences can be used:

Decision Mapping – visually outlining prospects' purchase decision-making processes with their information needs to identify current sales information strengths and weaknesses

Prospect Voice – defining the specific language of prospects and prospect types, and how sales professionals can better reflect that language in their sales information

Account Plan Elements – each sales professional presents three to five new IQ based account plan elements along with their supporting factual, procedural or reasoning information questions, which then get reviewed by training participants

Sales IQ Research – introducing a prospect questioning process that enables sales professionals to receive direct input from prospects about their IQ needs and preferences

Early Warning Systems – showing sales professionals how to use IQ account plan elements to receive early warnings on emerging purchase decisions so that, if necessary, additional sales information can be provided

This paper applies a data quality framework to the area of sales documentation. In doing so, we have interpreted the framework in a way that allowed us to compile beneficial IQ elements for sales proposals. In compiling this list, it became evident that the quality of sales proposals depend not only on the innate information creation and communication skills of sales professionals, but also on the available *knowledge* regarding the prospects' information needs and preferences. Consequently, *high sales information quality is dependent on high account plan information quality*. This paper suggests that the quality of an information product can be dependent on other information products. Future research can look at such information quality interdependencies in other business functions and use other more rigorous methods than our qualitative, interpretative approach.

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APPENDIX: INTERVIEW DETAILS

Five cross-industry exploratory interviews were conducted with marketing and sales managers from five companies leading in their respective industries. Each interview lasted approximately two hours. For confidentiality reasons, only the industry and not the names of the companies or the participating individuals are indicated.

1. Personal Interview with the National Sales Director, Solutions, Major Swiss Telecommunication Company, 25th of November 2003.
2. Personal Interview with the Manager Financial Services, Enterprise & Partner Group, Major Computer Software Company – Swiss Division, 25th of November 2003.
3. Personal Interview with the Marketing Manager, Enterprise Systems Group, Major Computer Hardware Company – Swiss Division, 26th of November 2003.
4. Personal Interview with the National Sales Director, Pharma, Major Pharmaceutical Company – Swiss Division, 2nd of December 2003.
5. Personal Interview with the Head of Facultative Underwriting, European Unit, Major Reinsurance Company – German Headquarters, 3rd of December 2003.