An Intraorganizational Perspective of Sales Teams

- A case study of the design and processes of a sales team in the cloud software industry

Master's Thesis 30 credits
Department of Business Studies
Uppsala University
Spring Semester of 2019
Date of Submission: 2019-05-29

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Abstract
The shift towards relationship marketing entails an increased attention directed to building collaborative relationships in the business-to-business market. This has further contributed to the current interest in the intraorganizational setting in the area of sales and key account management, and more specifically the notion of sales teams. In light of the above, the purpose of this study is to develop a conceptual framework emphasizing the intraorganizational perspective of such teams. Within this context, the team’s design and processes have been highlighted in relation to its performance and ability to form relationships with customers. To provide insights to the purpose of this study a single-case study was conducted in a company operating within the cloud software industry. The analysis demonstrates how the design of the team, depicted by the formalization of procedures and the heterogeneity of team members’ expertise, constitutes the frame in which the processes are carried out. Further, the interplay of communication, proactiveness and alignment of goals showed to constitute key processes enabling the team to build relationships with its customers. Thus, by providing a conceptual framework emphasizing the intraorganizational perspective of sales teams, this study contributes to the theoretical discussion as well as to practitioners in the field.

Key words: Intraorganizational sales team, team design, team processes, formalization, heterogeneity, communication, proactiveness, alignment of goals, customer relationship
**Acknowledgements**

First, we would like to direct many thanks to the EazyStock team for warmly welcoming us into your organization and your daily work. Your patience, openness and willingness to share your insights with us were invaluable for the realization of this thesis. Thank you! Second, we would like to express our gratitude to our supervisor, Virpi Havila, for her support and guidance throughout this process. We are thankful to you for always taking your time to share your experiences, but also for encouraging and challenging us further to improve ourselves. Last but not least, we would like to show our appreciation to all members of our seminar group. We are grateful for the constructive discussions, feedback and ideas you provided us during the seminars this spring, thank you!

2019-05-27

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1. Introduction

“For this particular customer we started with three project definition workshops. The first two I did by myself where I met with the customer, their project manager, and their lead designer. Then when we got down to the details of “Here’s what’s going to happen daily” that’s when I engaged Jim so that we could set the expectations up front. I pulled the project manager in later, and then our tech guys.”

The above extract from the article by Steward, Walker, Hutt and Kumar (2010, pp. 556–557) illustrates the notion of a sales team managing the customer relationship. To understand the evolvement of such teams the shift towards relationship marketing could be used as point of departure. Relationship marketing has been associated with the increased attention directed to building collaborative relationships in the business-to-business market (Dwyer, Schurr & Oh, 1987; Morgan & Hunt, 1994; Palmatier, 2008; Weitz & Bradford, 1999; Workman, Homburg & Jensen, 2003). Weitz and Bradford (1999, p. 241) describe it as “the focus of marketing activities on establishing, developing and maintaining cooperative, long-term relationships”. The emphasis on relationship marketing entails that short-term, transactional exchanges between business actors have shifted towards more long-term relationships (Workman et al., 2003). In line, the relationship development has been conceptualized as a process evolving through different phases (Dwyer et al., 1987; Polonsky, Gupta, Beldona & Hyman, 2010).

The relational focus, along with rising customer expectations, has further generated changes in the area of personal selling and sales management (Jones, Dixon, Chonko & Cannon, 2005; Weitz & Bradford, 1999). In the context of relational marketing, salespeople have adopted a partnering role focused on creating value for its own organization as well as for the customer firm (Weitz & Bradford, 1999). Further, the knowledge required to successfully manage the increasing customer demands implies that the selling process can no longer be handled by the individual salesperson alone (Steward et al., 2010; Üstüner & Godes, 2006; Üstüner & Iacobucci, 2012; Workman et al., 2003). Instead, the notion of sales teams (Jones et al., 2005; Weitz & Bradford, 1999), core selling teams (Moon & Armstrong, 1994), ad hoc selling teams (Steward et al., 2010), key account teams (Ivens, Pardo, Niersbach & Leischnig, 2016) and global customer teams (Atanasova & Senn, 2011) is highlighted.
1.1 Problem statement

Following from the changes described above, the traditional focus on the individual as the unit of analysis in the selling literature has shifted towards the team level (Moon & Armstrong, 1994; Weitz & Bradford, 1999). This in turn could be seen as one of the factors contributing to the current interest in intraorganizational issues, highlighted both within the research area of key account management (Gupta, Kumar, Grewal & Lilien, 2019; Ivens et al., 2016; Workman et al., 2003) and in the selling literature (Bolander & Richards, 2018; Bolander, Satornino, Hughes & Ferris, 2015; Üstüner & Iacobucci, 2012).

However, until recently research in these areas is argued to have had more of an interorganizational focus, emphasizing aspects of the customer relationship (Bolander & Richards, 2018; Bolander et al., 2015; Steward et al., 2010; Workman et al., 2003) and the external relationship management task (Ivens et al., 2016). Bolander and Richards (2018) and Ivens et al. (2016) mean that due to this the firm-internal, or intraorganizational, relationships have been overlooked. Further, insights about the interplay of employees involved in sales and key account activities and how these processes influence organizational performance is limited (Ivens et al., 2016; Steward, et al., 2010). In light of the above, a better understanding of the intraorganizational setting has been called for (Bolander & Richards, 2018; Steward et al., 2010; Workman et al., 2003). Within this context, Jones et al. (2005) especially argue for the importance of studies exploring what drives success in team selling and key account management.

Recent studies in these areas have started to touch upon such issues (e.g. Atanasova & Senn, 2011; Bolander et al., 2015; Ivens et al., 2016; Üstüner & Iacobucci, 2012). The investigation conducted by Bolander et al. (2015) suggests that salespeople’s internal relationships and activities essentially impact sales performance. In line with Plouffe and Barclay (2007) they propose that internal aspects account for more of the variance in salespeople’s performance than external interactions with customers. Moreover, Atanasova and Senn (2011) mean that the team’s performance is driven by processes, such as communication and collaboration, conflict management and proactiveness. They further suggest that future research should continue to deepen the understanding of such processes. In addition, the design of the team is emphasized to have an impact (Atanasova & Senn, 2011; Cohen & Bailey, 1997; Stewart, 2006; Workman et al., 2003). Thus, considering the sales team as a central building block in the relationship development process with customers it becomes essential to better understand the intraorganizational perspective of such a team, involving its design and processes.
1.2 Research purpose

The purpose of this study is to develop a conceptual framework emphasizing the intraorganizational perspective of sales teams. Addressing the call for research considering the intraorganizational setting, the team’s design and processes developed to cope with the customer will be explored. As highlighted, the design and processes of sales teams have been discussed in relation to their performance and ability to form relationships with customers. To provide insights to the purpose of this study a single-case study will be conducted in a company operating within the cloud software industry. Guiding the study towards its purpose, the following research question is formulated:

*How does an intraorganizational sales team in the cloud software industry work internally to build relationships with its customers?*

In this thesis, the term *intraorganizational sales team* reflects the phenomenon to be studied. The reason for making use of this term is further motivated in section 2.1 *Different conceptualizations of sales teams*. Moreover, the nature of the cloud software industry illustrates the importance of managing strategic business relationships (Padilla, Milton & Johnson, 2015), as suppliers often depend on relationships with other companies to provide end customers with integrated solutions (Solomon, 2015). Further, the case chosen constitutes an example of what has been highlighted in earlier research, namely that multiple employees in the supplier firm are involved in the sales and relationship development process with customers. Consequently, we argue that it represents a suitable context to explore the purpose of this study.

1.3 Unit of analysis

Within the literature on sales and key account management, the terms *interorganizational* and *intraorganizational* are used to differentiate between the external relationship between business actors and the firm-internal setting (Gupta et al., 2019; Homburg, Workman & Jensen, 2002; Ivens et al., 2016; Üstüner & Iacobucci, 2012). Considering the sales team, it could thereby be seen to involve both an inter- and an intraorganizational context. To not repeat earlier research emphasizing its interorganizational relationships with customers, this study will focus on the intraorganizational design and processes needed to develop such customer relationships. Accordingly, this study will adopt the intraorganizational sales team as the unit of analysis.
2. Theoretical framework

This chapter introduces the theoretical framework, constituting the basis for studying the proposed research question and thereby reach the purpose of this study. In section 2.1 terms to describe the intraorganizational sales team, such as selling team and key account team, are presented. Following, in section 2.2 and 2.3, aspects related to team design and team processes are discussed. The chapter ends with a description of the analytical lens derived from the literature.

2.1 Different conceptualizations of sales teams

Considering the purpose to develop a conceptual framework emphasizing the intraorganizational perspective of sales teams, research within the area of both sales and key account management offers valuable insights. However, many different concepts have been used by researchers in these domains (key account team, core selling team, ad hoc selling team, global customer team). Further, a review involving some of the work on this topic underlines that the appreciations of how these concepts relate to each other deviate. Still, it does highlight some recurrent characteristics used to conceptualize and differentiate between such teams. These features include what type of customer(s) the team is involved with, whether it consists of permanent members or is coordinated as an ad hoc team, and resulting from that, whether the team leader has formal authority of members or not. Some of these different viewpoints are presented below.

In their early work, Moon and Armstrong (1994) note that selling team, selling center and national account team, or similar terms like key account team, have all been used to elaborate on selling efforts involving multiple people. In an attempt to bring clarity to the understanding of selling teams they conceptualize the core selling team as an extension of the national account team. Whereas Moon and Armstrong (1994) emphasize the similarity between national account teams and core selling teams, they mean that they differ in regard to that the core selling team is not restricted to large, complex customers.

In turn, adopting a key account management (KAM) approach is described to entail a different treatment of the company’s key accounts, compared to other accounts (Workman et al., 2003). The notion of key account management is associated with the additional activities and employees allocated to the company’s most important customers, referred to as key accounts.
Arnett, Macy and Wilcox (2005) use the concept of core selling teams, interpreted as one example of a KAM strategy, to emphasize how such teams involve members from different organizational units dedicated to the firm’s key accounts. Ivens et al. (2016) take a partly different stance by distinguishing between the key account (KA) functional team, consisting of the KA managers, and the KA support team, which involves employees from other functional units. In contrast to the KA managers assumed to devote the majority of their time to the key accounts, the supporting members are not tied to these accounts but belong to other organizational departments. Resulting from this, the KA manager’s lack of formal authority in relation to the KA support team is highlighted. Atanasova and Senn (2011), who make use of the term global customer team related to the notion of key account teams, share this viewpoint. In line with Ivens et al. (2016), they stress that the team leader does not have the formal authority of employees involved in the global customer team.

Steward et al. (2010) adopt an additional perspective, using the term ad hoc selling team, associated with the cross-functional team coordinated by a salesperson. Considering complex sales situations between companies, the salesperson is described to be responsible for a number of customers, for which he or she assembles the expertise needed. Steward et al. (2010) maintains that this situation stands in contrast to that of team selling, which they indicate to involve team members linked to a specific customer. The above conceptualization could however be seen to resemble that of Ivens et al. (2016), considering the KA support team. Still, Steward et al. (2010) perceive the key account team as permanent, and therefore as something different from the ad hoc selling team.

The various perceptions of key account teams, selling teams and alike highlighted above may be partly understood considering that the authors emphasize different features of the teams. Still, in some cases different terms seem to be used to describe the same type of team (e.g. Ivens et al., 2016; Steward et al., 2010). With an awareness of the various concepts that have evolved, this study does not take a stance in the discussion on which one is most suitable. Instead it makes use of the term intraorganizational sales team, reflecting the phenomenon, rather than a specific concept brought forward. Additionally, this study involves insights from both the sales and the key account management literature. This is in line with the understanding of key account management to be part of the broader research stream of personal selling and sales management (Homburg et al., 2002; Jones et al., 2005; Moon & Armstrong, 1994).
2.2 The design of sales team

The notion of team design has been connected to team performance in diverse works where different design constructs have been introduced (Atanasova & Senn, 2011; Cohen & Bailey, 1997; Homburg et al., 2002; Stewart, 2006). The importance of team design is connected to the complexity of sales teams resulting from combining individual attributes, skills and abilities (Weitz & Bradford, 1999). Therefore, team design is proposed to be significant to achieve promising team performance (Atanasova & Senn, 2011; Cohen & Bailey, 1997; Stewart, 2006).

Atanasova and Senn (2011) consider the team’s design to indirectly influence performance through different team processes. Adopting a partly different view, Cohen and Bailey (1997) argue the design to have both a direct impact on the team’s outcomes, as well as an indirect effect through processes such as communication and conflict. Stewart (2006) emphasizes three general design categories which have been introduced earlier in the work of Cohen and Bailey (1997). These include group composition, task design and organizational context.

With the intraorganizational sales team as the unit of analysis, the following sections will introduce two design constructs that have been argued to impact the performance of sales teams. The first construct is derived from the work of Homburg et al. (2002) that emphasize formalization as a key dimension in designing the key account program involving the team. The concept has been discussed based on the level of formalization and how it is connected to performance (Homburg et al., 2002; Vanharanta, Gilchrist, Pressey & Lenney, 2014; Workman et al., 2003). The second construct is heterogeneity discussed by Atanasova and Senn (2011) and Stewart (2006). Teams within the area of sales are described to require members with different expertise (Atanasova & Senn, 2011; Moon & Armstrong, 1994; Weitz & Bradford, 1999; Yang, Brashear & Boles, 2011), motivating the choice to include this term as a second construct of team design.

2.2.1 Formalization of the team’s procedures

Homburg et al. (2002) direct attention towards the design of the KAM approach, including the design of the team associated with these activities. Highlighting that much research within this area has been conducted in large organizations, formalized key account programs are argued to have been emphasized. In response to this, Homburg et al. (2002) extend the conceptualization of key account management considering companies with formalized programs, as well as those
with non-formalized approaches. In the context of key account management, formalization is defined as “the extent to which the treatment of the most important customers is governed by formal rules and standard procedures” (Homburg et al., 2002, p. 45). Further, it is linked to the presence of formal expense budgets, documentation processes, guidelines on how to treat the key accounts and internal communication channels that are followed when working with the accounts (Homburg et al., 2002; Salojärvi, Sainio & Tarkiainen, 2010; Workman et al., 2003).

While Homburg et al. (2002) encourage organizations to actively manage their key accounts, they stress that it does not have to be through adopting a formal approach to key account management. Further, the study conducted by Workman et al. (2003) finds formalization of the KAM approach to have a negative impact on performance. The results are explained through highlighting the risk of formalization to limit flexibility, and in particular the ability to be flexible in regard to customers’ demands.

Vanharanta et al. (2014) emphasize that both formal and less formal, post-bureaucratic, approaches to the design of key account management could be suitable, depending on the organizational context. To exemplify, a formal design may be beneficial implementing key account management in a company, as it helps to guide and train the actors involved. In contrast, a post-bureaucratic approach could be more favorable considering the long-term effectiveness of KAM. Following from this, Vanharanta et al. (2014) encourage reflexivity, in order to continuously balance the approach of a formal and less formal design to key account management.

2.2.2 Heterogeneity in regard to expertise

The teams described in the sales literature (Moon & Armstrong, 1994; Weitz & Bradford, 1999; Yang et al., 2011) and in the key account literature (Atanasova & Senn, 2011) are emphasized to be cross-functional with members possessing different knowledge and expertise. Following from this they are characterized by heterogeneity, associated with the diversity of members’ skills and knowledge (Atanasova & Senn, 2011), and by interdependencies among members (Weitz & Bradford, 1999). Teams consisting of members with different knowledge have further been conceptualized as skill-differentiated teams (De Jong, Driks & Gillespie, 2016). In this context, every member is considered important due to the unique abilities they possess and
contribute to the team. This further implies that team members are dependent on each other to combine their specialized knowledge in pursuit of the team’s common goals.

While studies have been conducted to better understand the relationship between teams characterized by heterogeneity and performance outcomes, the results have been ambiguous (Stewart, 2006; Webber & Donahue, 2001). In support of heterogeneity, the contributions received from different perspectives are highlighted, whereas homogeneity is associated with less conflict among team members (Stewart, 2006). However, heterogeneous teams are emphasized to be suitable considering more dynamic environments (Stewart, 2006) and tasks requiring the input of various competencies (Atanasova & Senn, 2011). Weitz and Bradford (1999) further mean that the communication and conflict problems related to heterogeneous teams could be bridged if there are some overlap of members’ experiences and knowledge. The following quote illustrates this viewpoint: “This shared knowledge results in a greater understanding of the different perspectives represented on the team and facilitates communication among team members” (Weitz & Bradford, 1999, p. 249).

In addition, Weitz and Bradford (1999) propose that teams consisting of members with different knowledge hold great task interdependency. They describe the outcome of interdependent tasks as a result of “the degree to which team members work together and contribute their unique abilities to accomplish a goal” (Weitz & Bradford, 1999, p. 249). Considering the character of an interdependent team, it further implies that members rely on each other for reciprocal inputs (Stewart, 2006). Also, Lai and Yang (2017) emphasize the connection between task interdependency and communication, stating that interdependency on the team level positively impacts formal information sharing.

2.3 Team processes characterized by interaction

The notion of team processes has been emphasized as one way of understanding the interactions among team members contributing to the team’s outcomes (Atanasova & Senn, 2011; Cohen & Bailey, 1997; Marks, Mathieu & Zaccaro, 2001). Atanasova and Senn (2011) comprehend the team design and the organizational context to impact the team processes, that in turn constitute key mediating processes affecting the outcomes. Team processes have been described in terms of members’ interdependent acts, involving cognitive, verbal and behavioral activities carried out to realize common goals (Marks et al., 2001). Furthermore, the interactions among team members are closely related to the understanding of team processes, illustrated by
the following conceptualization: “Processes are interactions such as communication and conflict that occur among group members and external others” (Cohen & Bailey, 1997, p. 244). While Cohen and Bailey (1997) focus on conflict and communication, Marks et al. (2001) adopt a broader view, considering different processes such as mission analysis, goal specification, strategy formulation and coordination. Considering the particular context of the global customer team, Atanasova and Senn (2011) emphasize communication and collaboration, conflict management and proactivity as central processes.

Making use of the understanding of team processes, the following sections present three processes highlighted in previous research. In line with earlier frameworks (Atanasova & Senn, 2011; Cohen & Bailey, 1997) communication is considered a central process. Further, proactiveness is included in line with the argument by Atanasova and Senn (2011), stressing its importance in more dynamic and complex environments, corresponding to the cloud software industry. The third process described below is the alignment of goals. Following the appreciation of Cohen and Bailey (1997), these aspects are considered group psychological traits, while Marks et al. (2001) include goal specification as a team process. In the framework developed by Atanasova and Senn (2011) goal and role clarity is treated as part of the team design, rather than as a process. Still, based on the conceptualization of team processes closely related to team interactions (Atanasova & Senn, 2011; Cohen & Bailey, 1997; Marks et al., 2001), and in line with the view of Marks et al. (2001) the alignment of goals is considered a process taking place through team members’ interactions.

2.3.1 Formal and informal communication
Communication has been emphasized in relation to the performance of selling teams and key account teams (Atanasova & Senn, 2011; Ivens et al., 2016; Mathieu, Gilson & Ruddy, 2006; Peters & Fletcher, 2004). While some perceive communication as directly influencing team performance (Atanasova & Senn, 2011; Cohen & Bailey, 1997; Lai & Yang, 2017), others consider communication as an antecedent of trust and commitment, that in turn is linked to the key account teams’ performance (Ivens et al., 2016). Furthermore, within this context, Cohen and Bailey (1997) and Atanasova and Senn (2011) view communication as a team process.

Communication is discussed in terms of modality, referring to either formal or informal communication manners (Peters & Fletcher, 2004; Schultz & Evans, 2002). Formal communication is associated with meetings and written modes of interactions, while informal
manners of communication involves spontaneous and unstructured exchanges (Lai & Yang, 2017). Peters and Fletcher (2004) emphasize informal communication and present it as one construct of collaborative communication linked to positive team outcomes. Related to collaborative communication, the term content is used to describe the type of messages exchanged, considering whether the content takes the form of orders and instructions or involves the sharing of opinions and information. Collaborative communication is associated with indirect, informal and personalized messages. Further, the content could contain strategic meanings, entailing “a more advanced level of interaction in that the focus of the discussions is at a higher strategic level than discussion focused on tactical (day to day) problems” (Schultz & Evans, 2002, p. 25).

In the context of key account management teams, Lai and Yang (2017) further highlight how formal information sharing may facilitate dialogue, information coordination and joint decision making. The notion of formal information sharing is understood as “information sharing that a salesperson conducts with his or her counterparts on the team in a structured, traceable, and formal setting such as meeting and training” (p. 319).

2.3.2 Proactiveness as a team behavior
Considering processes within the intraorganizational sales team (Atanasova & Senn, 2011) and in relation to the customer (Homburg et al., 2002) proactiveness is emphasized. Atanasova and Senn (2011, p. 282) consider proactiveness in the context of global customer teams, making use of the term “proactive team behaviors”. Similarly, Hyatt and Ruddy (1997) interpret proactiveness as a behavior. In an attempt to capture the proactive behaviors of group members the concept is translated into activities such as addressing issues before they evolve into problems, continuously reviewing work processes and actively trying to identify areas for improvement. Adopting a different perspective, Murphy and Coughlan (2018) consider proactiveness as an individual characteristic, positively related to the performance of key account managers. Following from this understanding, proactiveness is described to be illustrated in managers who plan ahead and who capture opportunities emerging in relation to customers. Proactiveness has further been associated with taking charge, described to relate to employees’ willingness to challenge the status quo and to take constructive actions (Crant, 2000). It is connected to employees’ perceiving themselves (Crant, 2000) and their teams (Kirkman & Rosen, 1999) as responsible, empowered and self-efficient. While applying the concept to an individual level (Crant, 2000; Murphy & Coughlan, 2018), in contrast to a team
or group level (Atanasova & Senn, 2011; Hyatt & Ruddy, 1997; Kirkman & Rosen 1999), proactiveness is described to take similar expressions.

Further, Wang, Zhang, Thomas, Yu and Spitzmueller (2017) propose proactiveness on the team level to be connected to employees’ engagement in activities directed towards common goals. This influence is suggested to occur when proactiveness is a common behavior among all team members. Also Parker, Bindl and Strauss (2010) connect proactiveness to goal-setting and the strive to reach these goals. Moreover, they highlight how teams characterized by positive interpersonal relationships are more likely to nurture a climate that encourages proactive actions and increases engagement in the teams’ goals.

Proactiveness could further be considered in relation to the customer, as Homburg et al. (2002, p. 44) define the term activity proactiveness as “the extent to which activities are initiated by the supplier”. The opposite situation is associated with activities initiated by the customer. Considered from this viewpoint, proactive behaviors on part of the supplier is linked to positive outcomes in regard to the relationships with customers.

**2.3.3 Alignment of goals and vision**

In the context of global customer teams, Atanasova and Senn (2011) argue for the importance of clearly defined goals and roles among team members. Aligning the goals of individuals with those of the team and the overall organization is suggested to have a positive impact on the processes carried out by the team. Taking this one step further, Marks et al. (2001) consider the identification of a common mission and the specification of goals part of the team processes. In line with the understanding of processes as closely connected to interactions (Atanasova & Senn, 2011; Cohen & Bailey, 1997; Marks et al., 2001), the mission analysis is described to involve “verbal discussion to ensure that all members have a shared vision of the team’s purpose and objectives” (Marks et al., 2001, p. 365).

The alignment of team members’ goals and vision could further be linked to the notion of shared values, associated with the common understanding of aspects such as what goals are important and what behaviors and policies are suitable (Morgan & Hunt, 1994). Morgan and Hunt (1994) further relate shared values to norms among actors, as conceptualized by Heide and John (1992). Norms are described as “behavioral expectations” and could be distinguished on a broad societal level, an industry level, as well as among groups of individuals (Heide & John,
Reflecting the focus on the intraorganizational sales team, the latter application emphasizing norms within the group is considered. Stewart (2006) highlights that teams characterized by high interdependency require intrateam coordination and members who work closely together, which in turn support the development of shared norms within the team.

An additional concept could be seen to relate to the above, that is esprit de corps, defined as “the extent to which people involved in management of key accounts feel obligated to common goals and to each other” (Workman et al., 2003, p. 10). To illustrate, the lack of esprit de corps is associated with team members’ limited commitment to goals established in relation to key accounts. Salojärvi and Saarenketo (2013) connect the notion of esprit de corps to feelings of belongingness and membership of a team. Accordingly, Stewart (2006) argues that esprit de corps is to be encouraged by high intrateam coordination. Esprit de corps is further suggested to enhance the development of an internal culture emphasizing the key accounts (Workman et al., 2003). In line, Day (2000) argues for the importance of a relationship orientation to permeate the norms, values and mindsets of employees in order for the company to build strong relationships with its customers.

### 2.4 Analytical lens

Based on the theoretical framework presented above, the analytical lens provides a bridge to the coming analysis. Considering the purpose to develop a conceptual framework emphasizing the intraorganizational perspective of sales teams, concepts associated with team design and team processes will be applied. The terms related to design, involving *formalization* and *heterogeneity*, are suggested to form the basis for how the team works internally and thereby set the conditions for the processes carried out. Formalization is reflected in the team’s internal guidelines and standard procedures (Homburg et al., 2002; Salojärvi et al., 2010; Workman et al., 2003). Heterogeneity is in turn associated with the diversity of team members’ skills and knowledge (Atanasova & Senn, 2011) and the resulting task interdependency (Weitz & Bradford, 1999).

Further, three team processes will be considered: *the process of communication*, *the process of proactiveness* and *the process of alignment of goals*. The process of communication involves formal and informal manners, as well as the content of communication (Peters & Fletcher, 2004; Schultz & Evans, 2002). To continue, the process of proactiveness is associated with
behaviors such as addressing issues (Hyatt & Ruddy, 1997), planning ahead and seizing opportunities (Murphy & Coughlan, 2018). Lastly, the process of alignment of goals will be emphasized, entailing common goals and a shared vision (Atanasova & Senn, 2011; Marks et al., 2001; Workman et al., 2003). In line with the view of these processes to be closely related to the interactions among team members, the analysis will further consider the possible linkages between processes. Considering the context of the intraorganizational sales team, its design and processes have been connected to the team’s performance, which in this thesis is understood to be manifested in the relationships developed with the organizations’ customers.
3. Method

This chapter provides insight into the methodological choices made throughout the study, as well as the reasoning behind those. Initially, in section 3.1, the qualitative research strategy and the case study design is described. Section 3.2 highlights how the interview guide was developed. It is followed by a presentation of the different techniques applied to collect data in section 3.3, that is interviews, observations and documents. In section 3.4 we elaborate on how the empirical material was interpreted and analyzed, including a discussion on reflexivity in section 3.5. Lastly, ethical considerations are highlighted.

3.1 Research strategy and design

Reflecting the purpose to develop a conceptual framework emphasizing the intraorganizational perspective of sales teams, the study makes use of a qualitative research strategy. Qualitative research is associated with an in-depth focus emphasizing the contextual uniqueness of the phenomenon studied (Bryman & Bell, 2011, p. 398). Further, qualitative research is argued to be beneficial when striving to develop an understanding of human interactions and organizational processes in a real-life context (Gephart, 2004). Within the context of team selling and key account management, Jones et al. (2005) encourage more qualitative research in order to enhance the understanding of such teams. Also Ivens et al. (2016, p. 107) emphasize the qualitative approach within this area, as they declare it to allow “studying phenomena in a flexible perspective, leaving room for the identification of missing factors”. In line, Steward et al. (2010), that adopted a qualitative research strategy to study ad hoc selling teams, highlight how it enabled for a comprehensive and detailed exploration.

Considering the steps involved in a qualitative research approach the interplay of different steps are underlined (Bryman & Bell, 2011, pp. 390–392). It is described to involve the iterative process of interpreting the data, redefining the research question and collecting further data, which corresponds to how this study was conducted. This is further connected to what is referred to as an abductive approach, described as going back and forth between theoretical concepts and empirical material (Bryman & Bell, 2015, p. 27). The abductive approach is suggested as an alternative to the inductive, often associated with qualitative studies. In contrast to the inductive strategy, relying on the empirical findings for the generation of theory, an abductive reasoning allowed us to connect theoretical and empirical aspects together through an ongoing process. Reflecting the continuous refinements of the theoretical framework
associated with an abductive approach (Dubois & Gadde, 2002), the analytical lens evolved in parallel with the data collection process.

Further, a single-case study design has been applied striving to answer the research question: How does an intraorganizational sales team in the cloud software industry work internally to build relationships with its customers? As described by Bryman and Bell (2011, p. 40) the research design reflects the significance attached to different aspects of the research process. To illustrate, adopting a case study implies a focus on understanding behaviors within a certain context while emphasizing the complexity and details of the specific case. In line, Yin (2009, p. 18) stresses the suitability of case studies when the aim is to understand a phenomenon “within its real-life context”, particularly in situations when phenomenon and context are difficult to separate. Taking this perspective entails that the social behavior of a group cannot be fully understood if not studied in the environment in which the team functions (Bryman & Bell, 2011, p. 404). This corresponds to the case studied, where our interest lies in the design and processes of an intraorganizational sales team attempting to build relationships with its customers. Following from the viewpoints presented above, we regard the qualitative research strategy, in the form of a case study, as appropriate for the purpose of this study.

3.1.1 Selection of case

The proposed research question was explored through a case study conducted in the Swedish organization EazyStock, operating under the commercial register of the mother company Syncron Int. While being part of a larger organization, EazyStock functions independently and targets different markets than Syncron Int. EazyStock provides an advanced cloud solution for inventory management, customized to small- and mid-sized wholesale distribution businesses (EazyStock, 2018). Further, the company’s business model entails that they form relationships with other companies, that in turn provide the software and technical support to end customers.

The reasoning behind the selection of the case lies in its appropriateness to address the purpose of this study and thereby add to the theoretical discussion within the research area of sales and key account management. As requested in the literature (Bolander & Richards, 2018; Jones et al., 2005; Steward et al., 2010; Workman et al., 2003), the team studied provides an opportunity to better understand the intraorganizational setting within the area of sales and key account management. Further, previous empirical studies are argued to have been conducted in large organizations, excluding smaller companies making use of less formalized approaches to
manage relationships with key customers (Homburg et al., 2002). In light of this, we consider the current case to be relevant as it provides the opportunity to highlight an additional perspective, emphasizing the intraorganizational sales team in a smaller organization.

In addition, the case was chosen due to one of the researcher’s previous experience as an intern within the organization. Based on an overall understanding of the market and more specifically of the operations of EazyStock, we were able to identify this as a case suitable for the study. Furthermore, it provided us with the contacts necessary to get access to the organization and increased the willingness of employees at the company to participate in the study.

3.2 Interview guide

In order to capture the dimensions associated with the sometimes abstract theoretical concepts, these terms were translated into questions that constituted the basis for the interview guide. In addition, highlighting how the concepts may be illustrated in the context of an intraorganizational sales team the guide provided direction for the observation and the review of documents. Below, we elaborate on how we have worked with the different concepts. A further overview can be found in Appendix 1 and the full interview guide in Appendix 2.

To begin, questions related to the term formalization were included to highlight to what extent structured procedures characterized the team’s work in relation to customers. In line with earlier research, formalization was associated with aspects such as formal rules, documentation processes and expense budgets (Homburg et al., 2002; Salojärvi et al., 2010; Workman et al., 2003). Further considering the design of the team, informants were asked questions to distinguish dimensions of heterogeneity. This involved questions related to their previous work experience, as well as their current role within the team. As emphasized in the literature (Atanasova & Senn, 2011; Moon & Armstrong, 1994; Stewart, 2006; Weitz & Bradford, 1999), this made it possible to identify the different knowledge and expertise possessed by members. Additionally, informants were encouraged to elaborate on their daily tasks and to what extent those were carried out together with other team members. The latter allowed us to distinguish aspects of task interdependency, as described by Weitz and Bradford (1999).

Turning to consider the team processes, questions reflecting communication, proactiveness and alignment of goals were posed. To gain a deeper understanding of the communication within
the team, we made use of the conceptualization elaborated on by Schultz and Evans (2002) and Peters and Fletcher (2004). This entailed that communication could be carried out in formal or more informal manners. In addition, it involved the content of communication, which meant that informants were asked to describe what was addressed during meetings and in conversations with colleagues.

Moving on to proactiveness, it has been associated with the behavior of teams that address issues at an early stage (Hyatt & Ruddy, 1997), as well as with the individual characteristic of managers planning ahead and seizing opportunities (Murphy & Coughlan, 2018). Crant (2000) further links the notion of proactiveness with taking charge. These dimensions were considered as informants were asked to depict how the team works internally throughout the relationship development process with customers. Follow-up questions were added to distinguish which individuals within the team that had been driving initiatives, allowing us to capture further aspects of proactiveness.

Lastly, the alignment of goals was considered. The importance of aligning the team around common goals and visions has been stressed in previous research (Atanasova & Senn, 2011; Marks et al., 2001; Workman et al., 2003). Considering the alignment of goals as a team process closely related to team members’ interactions, questions were asked to understand how goals and targets were established. Moreover, we strived to distinguish if, and then how, a common understanding of the team’s vision was accomplished.

In line with the strategy adopted by Steward et al. (2010), informants were encouraged to consider the questions in relation to their overall work, involving the relationship development process with customers. This approach corresponds to the understanding of case studies to focus on phenomenon within its context (Yin, 2009, p. 83). Further, we found informants to provide us with more detailed and comprehensive explanations when they were able to link their answers to concrete situations. Considering the observation, this came naturally as it was carried out in its regular context.

### 3.3 Data collection

Following the conceptualization used by Bryman and Bell (2011, pp. 40–41), we consider the case study design to be an overall framework guiding the collection and analysis of data. The
research design is in turn associated with different research methods, or techniques, for collecting data. Yin (2009, pp. 98–99) emphasizes that case study evidence may be derived from different sources, or as described by Bryman and Bell (2011, p. 60), through making use of different methods. For this study, interviews, observations and documents were utilized to develop a comprehensive understanding of the intraorganizational sales team. This is in line with the process of triangulation argued to enhance the overall quality of the study as it allows the phenomenon to be explored through multiple sources (Yin, 2009, p. 116–117). The application of the different methods is elaborated on below.

3.3.1 Interviews

As part of the case study, interviews were conducted with members of the intraorganizational sales team at EazyStock. Interviews are argued to constitute an essential source of information in the context of case studies (Yin, 2009, p. 106). Qualitative interviews can further be described as unstructured or semi-structured, reflecting the degree of structure (Bryman & Bell, 2011, p. 465). Making use of this understanding, the first interview emphasized the unstructured dimension, allowing us to capture aspects that the interviewees perceived relevant. To illustrate, the very first interview involved two employees from the organization and centred around their internal roles and the activities carried out in relation to customers. Including two people from EazyStock in this initial discussion contributed to making it a dynamic and lively dialogue. Rather than being an interview where the researchers posed questions for the interviewees to answer, the conversation was characterized by interactions among all participants. Insights from this first discussion was used as a reference point in the further review of academic literature, as the interplay of empirical material and theory allowed a narrower focus for the remaining interviews.

Consequently, the further interviews took more of a semi-structured shape, as questions were developed to reflect specific topics that we wanted to address. Still, as highlighted by Bryman and Bell (2011, p. 467), both the unstructured and the semi-structured interview are flexible and put emphasis on how the interviewees understand and interpret the events discussed. In line, although the semi-structured approach implied that we made use of an interview guide, it did not prevent us from adding questions not included in the guide to follow up on aspects described by informants. Furthermore, the questions were not always posed in the same sequence, but we strived to adjust the order reflecting the interviewees’ responses. Although informants were addressing one of our questions to begin, many of them naturally continued to
elaborate on the subject, meaning that more than one question was covered. In these situations, we did not have to explicitly state all of the questions in the interview guide, but it helped us to ensure that all topics were covered.

To start the interviews the focus of the study was shortly described, allowing the interviewees to gain a general understanding of its purpose. When responding to the interview invitation, participants had been provided a similar introduction to the subject. Still, we wanted to include it as part of the interview to give the informants the possibility to bring up any questions they might have had in regard to the study. After having addressed the ethical aspects associated with their participation, further highlighted below in section 3.6 Ethical considerations, the interviewees were asked to describe their background and current role at the company. Bryman and Bell (2011, p. 475) emphasize this general information to provide context to informants’ answers. Further, we asked the interviewees to illustrate their understanding of the EazyStock team making use of a pen and a paper. This exercise put focus on the informant’s point of view, emphasized to be central within the area of qualitative research (p. 410). It further enhanced our appreciation of participants’ understanding of the team and prevented us from “forcing” our own view on them. In addition, we perceived this opening of the interview to release any tension felt by participants and to provide a good starting point for the further discussion.

To capture informants’ full expressions and formulations, all interviews were recorded after having received the consent of the interviewees. As described by Bryman and Bell (2011, p. 476) the recording and transcription of interviews allowed for a detailed analysis of data. Considering the emphasis put on informants’ perspectives as part of the qualitative research strategy, it was important to capture their own words and interpretations. Furthermore, the flexibility of the semi-structured interview approach meant that we had to stay attentive to come up with relevant follow-up questions reflecting informants’ responses. From this perspective, being aware that the interviews were recorded helped us to stay alert and focused on the present conversation.

The interviews were carried out face-to-face at the company’s office in Stockholm, with the exception of one interview that was conducted over Skype. The six interviews held in the office lasted between one and a half hours to two hours, while the Skype interview was a bit shorter, lasting for one hour. Moreover, all interviews were carried out in English. The reason for this was partly that it is the common language of the researchers, allowing both of us to actively
participate during the interviews. However, as EazyStock is a global organization implying that employees have daily interactions in English, it was also natural for informants to speak English. Further, since the research was conducted in English, using the same language during the interviews helped us to ensure accuracy of informants’ citations. The latter is in line with the argument by Bryman and Bell (2011, p. 488), meaning that such an approach excludes linguistic issues associated with translation.

3.3.2 Selection of informants
A purposive sampling approach was applied when selecting the informants for the interviews. This entails that participants are chosen due to strategic reasons as their involvement is considered relevant for the understanding of a phenomenon (Bryman & Bell, 2011, p. 442). EazyStock is structured as a matrix organization, meaning that employees are members of both a regional and a functional team. In this study focus has been on the Swedish team comprised of five members, with expertise ranging from sales and marketing to highly technical knowledge. Three of the Swedish team members do further have global management roles, entailing that they take on operational roles as part of the Swedish team while adopting strategic roles globally.

In addition to the members of the Swedish team, a further informant was included making use of snowball sampling. Bryman and Bell (2011, p. 192) describe this sampling technique to entail that the researchers are put in contact with additional informants relevant to the study. In line, the Global Head of Customer Success located in the UK was included as an interviewee, as members of the Swedish team regularly interact with and report to this person. Further, Eisenhardt and Graebner (2007) emphasize informants from different functions and hierarchies to be beneficial considering the collection of case study data. As the interviews involved team members with various expertise and members who hold managerial roles, as well as members who do not, we have strived to highlight different perspectives contributing to the richness of data. Table 1 gives an overview of informants.
Table 1. Overview of informants.

<table>
<thead>
<tr>
<th>Position of informant</th>
<th>Date of interview</th>
</tr>
</thead>
<tbody>
<tr>
<td>Head of Global Partner Strategy (Sweden)</td>
<td>29 Jan &amp; 25 Feb 2019</td>
</tr>
<tr>
<td>Head of Global Marketing (Sweden)</td>
<td>29 Jan &amp; 11 March 2019</td>
</tr>
<tr>
<td>Head of EazyStock (Sweden)</td>
<td>12 March 2019</td>
</tr>
<tr>
<td>Customer Success Manager 1 (Sweden)</td>
<td>14 March 2019</td>
</tr>
<tr>
<td>Customer Success Manager 2 (Sweden)</td>
<td>25 March 2019</td>
</tr>
<tr>
<td>Global Head of Customer Success (UK)</td>
<td>14 March 2019</td>
</tr>
</tbody>
</table>

3.3.3 Observations

In the context of case studies, Yin (2009, pp. 109–112) highlights two observation practices that may be used to enhance the understanding of the phenomenon studied: direct observation and participant-observation. Acting as a participant-observer is described to entail that the observer partakes in the activities studied (p. 111). This has not been performed as part of this case study, but in regard to transparency we would like to make the reader aware that one of the researchers earlier carried out her internship at the company. While we do not consider it appropriate to make use of her observations from this period, as they have not been properly documented, we argue that this has contributed to the understanding of the case. The general knowledge about the market in which EazyStock operates, as well as insights into the organization, has enhanced the collection and processing of data. To exemplify, the appreciation of the industry facilitated the interviews as we were able to understand the, at times, technical language used within the field. As a result, informants were able to pursue their narratives, not having to lose track due to questions regarding the meaning of terms. In addition, insights into the organizational structure and employees’ different roles facilitated the selection of suitable informants for the interviews.

Moreover, we were given the opportunity to perform what Yin (2009, pp. 109–110) refers to as direct observations. In contrast to participant-observations, this meant that we acted as
passive observers during the team’s weekly meeting. The Monday meeting was frequently mentioned during the interviews, indicating the central role it plays for the team. To strengthen our understanding of the team’s internal work the meeting provided an additional source of evidence. As described, we did not take an active role during the meeting but stayed in the background while the team discussed any relevant topics of the week. An issue associated with observations is the “reactive effect”, entailing the risk that people being observed change their behavior (Bryman & Bell, 2011, p. 280). In this respect the direct observation was performed after the interviews when informants were familiar with the researchers, which we believe contributed to them being more comfortable with our presence. Further, we did not ask to record the meeting, but took shorter notes to not disrupt the general atmosphere in the meeting.

3.3.4 Documents
Complementary to the interviews and the observation, documents were reviewed in order to enhance the overall understanding of the case. Saunders, Lewis and Thornhill (2007, pp. 248–249) consider written material such as administrative records, the organization’s website and internal emails as sources of secondary data. Bryman and Bell (2011, p. 550) further categorize secondary data as either public or not public domain. To exemplify, we made use of EazyStock’s website, considered as public domain, which provided us with an overview of the organization’s management team. Browsing the website was further beneficial to understand the company’s offering, its business model and the industry in which it operates.

In addition to the above, we were given access to internal documents, referred to as not public domain. Initially, we were provided with the organization’s partner agreement and partner profile. Although not directly connected to the purpose of the study, it enhanced our general understanding of the organization’s operations. During the meeting observed we were further given the chance to look into the team’s internal communication tools used by the team to interact and keep track of their work. We were also introduced to the forms and templates applied by the team to manage their internal work in relation to partners. This included the agenda for the weekly meeting that highlights important events, as well as the digital tool Salesforce. The latter helps the team to keep track of quarterly sales targets as well as projects and opportunities related to partners. Finally, we were given access to a recently developed partner plan, explicitly stating the goals set for the specific partner as well as who within EazyStock that is involved with the partner.
3.4 Interpretation and analysis

After having transcribed the interviews and put together our notes from the observation, we initiated the process of interpreting and analyzing the empirical material. To start, we read it through separately in order to allow for our individual views to form. Bryman and Bell (2011, p. 586) emphasize the interpretation and coding of data to involve multiple steps, where the material is further processed for each time it is reviewed. In line, having developed an overview and an understanding of informants’ responses within the context of the conversations, we started to systematically code the data. To help structure our interpretations we made use of Excel sheets where we added different themes and concepts in the vertical column, whereas the names of informants were added in the horizontal. The coding sheets were then filled with citations from the interviews and notes from the observation. This approach provided an overview and allowed us to compare and discuss our different interpretations. At this stage, we strived to stay open in regard to the themes illustrated in the empirical material. This meant that we did not limit our understanding of the concepts to the boundaries set in previous research. Instead, we aimed to stay receptive for additional ways that these concepts expressed themselves in the empirical findings. Still, to keep focused we continuously went back to the purpose formulated for the study, which allowed us to exclude aspects that were not considered relevant in regard to this. To exemplify, as we had adopted the intraorganizational sales team as unit of analysis we did not include aspects related to the customer firms.

When we had finished our individual coding, we went through each of the themes together to consider what citations or notes that we had included. In many cases, we had coded the data in a similar way. However, reviewing the Excel sheets did highlight situations in which we had interpreted things differently. An example of this involved that one of us had coded some quotations as reflecting communication, whereas the other had linked the same citations to alignment of goals. In such situations, we described the motivation behind our choices encouraging us to reflect on and put our different understandings into words. In some of these situations we came to a common conclusion on how to code the data. Still, in other situations we realized that the specific quotation could and should be coded in more than one way, as highlighted by Bryman and Bell (2011, p. 586). Table 2 provides examples of how some citations were interpreted and analyzed.

While the above approach was applied to analyze the data from the interviews and the observation, the documents were reviewed to provide context to informants’ responses and to
the observed meeting. The review of documents extended our understanding as it provided an actual idea of what the documents and tools referred to looked like. In that way, the collected data was considered in support of each other to develop a comprehensive understanding of the case.

Table 2. Examples of interpretation and analysis of empirical material.

<table>
<thead>
<tr>
<th>Formalization</th>
<th>Heterogeneity</th>
<th>Communication</th>
<th>Proactiveness</th>
<th>Alignment of goals</th>
</tr>
</thead>
<tbody>
<tr>
<td>&quot;Because you want to have processes and you want to have tools but you don’t want to complicate things too much, when you don’t need it then it is just going to take time to update tools.&quot;</td>
<td>&quot;I think first of all we need to have different expertise in different people and I honestly think that in Sweden we have a really strong team...&quot;</td>
<td>&quot;Then we talk to each other, you know, the informal discussions in an office, like “Oh, now he called and he said this and that”, to make sure that everyone is, that is super important, the informal talk about things.&quot;</td>
<td>&quot;So one of the customer success managers got involved because they had the expertise and then it turned naturally that they were the go-to person...&quot;</td>
<td>&quot;And to get this vision, that is something you need to talk about often, you need to sell the concept all the time.&quot;</td>
</tr>
<tr>
<td>&quot;I don’t want to add more meetings, because people have so many meetings anyway but to have some sort of structure so we document: these are the activities that we’ve been doing, this is where we are with this partner, so we can always go back to that...&quot;</td>
<td>&quot;She prepared the slides, we both had some inputs on what we should talk about and during the actual webinar I was the expert and she was asking questions and so on, so that’s how we set it up.&quot;</td>
<td>&quot;And those meetings are really, the more I think about it, the more I realize how important they are for us to actually keep on the same page because it’s, always easier to talk.&quot;</td>
<td>&quot;... we are now trying to focus it down and each Customer Success Manager should have kind of an agenda or a plan for that partner.&quot;</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>&quot;Since everybody is doing a little bit of everything, we have a lot of interactions and things together with each other so it’s not that one can go in that direction (pointing in different directions), since we work so much in this team together we walk in the same direction I think.&quot;</td>
</tr>
</tbody>
</table>

3.5 Transparency and reflexivity

The qualitative research approach has sometimes been subject to critique due to lack of transparency (Bryman & Bell, 2011, p. 409). To account for this, we have strived to provide the reader with insights into the reasoning behind and the choices made throughout the research process. To illustrate, this includes the motivation behind selecting the present case, the presentation of how the interviews were conducted, as well as the description of how the data was interpreted and analyzed. This is in line with the recommendation by Yin (2009, p. 122), stressing that an external reader should be allowed to follow the process from the empirical
material to the conclusions drawn, sustaining “a chain of evidence”. These aspects could further be linked to the term trustworthiness, emphasized as one way to evaluate qualitative research (Bryman & Bell, 2011, p. 395).

Furthermore, we have attempted to involve elements of reflexivity in the research process. A reflexive approach is associated with the awareness and reflection in regard to the researcher’s own assumptions (Alvesson, 1996). The emphasis on reflexivity reflects the questioning of the researcher as someone who can be value free (Alvesson & Sköldberg, 2000, p. 9; Bryman & Bell, 2011, p. 30). In contrast, the researcher is understood to be part of a social context in which the experiences and knowledge of the researcher will influence the interpretation of the phenomenon studied (Bryman & Bell, 2011, p. 30 & 700). Alvesson and Sköldberg (2000, p. 9) further argue that what is referred to as data could rather be seen as the result of the researcher’s interpretations. Applied to our study, this viewpoint illustrates the importance of being reflexive in terms of the meanings we ascribe to informants’ responses and to the observation conducted. With an awareness of this, we have strived to take advantage of us being two researchers in the process. To exemplify, we started by separately going through the transcribed interviews and the notes from the observation to then discuss the material together. This approach highlighted aspects that we had understood differently and thereby allowed us to distinguish and become aware of our assumptions. In turn, this made it possible to reflect upon these aspects together, corresponding to a reflexive approach.

Considering the evaluation of qualitative research, a further concept, that is transferability, is highlighted (Bryman & Bell, 2011, p. 398). This concerns whether the conclusions drawn from one study could be applicable to other contexts or not. As emphasized in regard to qualitative research (Bryman & Bell, 2011, pp. 408–409; Yin, 2009, p. 39), we have aimed to generalize to theory and not to population.

3.6 Ethical considerations
Consider the focus of case studies on “contemporary phenomenon in its real-life context”, ethical considerations become essential with regard to the individuals involved (Yin, 2009, p. 73). Following from this, the importance of being open to participants about the objectives of the study and to gain their informed consent is highlighted. In connection to introducing the study’s focus, we described how the data gained from the interviews was going to be handled
and used. To exemplify, the interviewees were informed that if they gave their consent to have the interviews recorded, we would be the ones listening to and transcribing the interviews. We further described that the full transcripts would not be included in the thesis, but that shorter quotes would be chosen to illustrate the findings. The informants were further offered to have the transcripts sent to them, to make us aware of any misconceptions. It was important for us to be transparent in relation to participants and to provide them with this information before they gave their consent to the interviews being recorded, and ultimately to participate in the study. This approach could be seen to correspond to what Bryman and Bell (2011, p. 476) describe as being “ethically sensitive”. Likewise, informants were made anonymous as the empirical findings were presented.

As earlier described, one of the researchers has previously worked as an intern within the organization in which the study was conducted. This has been emphasized from a positive perspective as it enhanced the overall understanding of the case. Still, having a relation to the organization and the informants could also be argued to make it harder to distinguish and bring forward any critical aspects. By being two researchers throughout the research process and by adopting a reflexive approach, we have attempted to address this issue.
4. Empirical findings

In this chapter we tell the story of the Swedish EazyStock team. Focus lies on the team’s internal work which is performed with the overall intention to build relationships with customers in the business-to-business market. Based on the empirical material, aspects related to the team’s design and internal processes are illustrated through the help of informants’ citations.

Background

In the interviews, informants mention partners and customers as two types of customers that they interact with. Partners correspond to EazyStock’s customers that in turn sell the company’s product to end customers. From the perspective of the Swedish EazyStock team, their main interest is to establish relationships with partners and their internal work revolves around this. Considering our focus on the intraorganizational sales team, we do not go in depth on the company’s different types of customers, but we find an awareness of this helpful to better understand informants’ narrations.

The emergence of a team

EazyStock was established in 2014 and since then the organization has grown from consisting of one person alone to becoming a team, as highlighted by the Head of EazyStock:

“You have to remember EazyStock is evolving. Back five years ago it was only me, it was only one person, I was alone and doing everything and then I started to hire people and now we are a team.” (Head of EazyStock)

In these five years EazyStock has evolved into what is described as a matrix organization, meaning that it is structured both functionally and region wise. In 2019, the organization employs about 25 people in six different countries. This study focuses on the Swedish team, which consists of the Head of EazyStock, the Head of Global Partner Strategy, the Head of Global Marketing, as well as two individuals holding the title Customer Success Manager. Still, resulting from the matrix structure, employees are not only members of one team, but belong to multiple teams. To exemplify, the Head of Global Marketing is part of the global marketing team, the regional Swedish team, as well as the global top management team. Considering that the organization consists of relatively few people, this further implies that the top management
team does not only hold strategic roles, but that they also adopt operational, hands-on roles as members of their regional teams.

Today, in 2019, EazyStock is described to have a handful of partners in the Swedish market, considering partners that are active and which the team is continuously engaging with. Further, some of these partners are regarded as more strategic, which implies that they are given more time from the Swedish team. One of the first relationships developed was with a company named Exsitec. At the time the relationship was initiated, the Swedish team consisted of the Head of EazyStock and the Head of Global Partner Strategy. The Head of Global Partner Strategy describes the discussion taking place internally between herself and the Head of EazyStock at this early stage:

“There was a lot of discussion internally, talking about Exsitec as a company. Do we think it’s a good fit or not? What are their place in the market? Are they growing? [...] Those kind of discussions and then obviously who does what.” (Head of Global Partner Strategy)

As illustrated, the internal conversation was a way to reflect upon and agree on whether Exsitec was the right way to move forward. In addition, it made it possible to coordinate the work between the two team members. In the case of Exsitec, the Head of EazyStock coming from a technical background assisted in these situations, while the Head of Global Partner Strategy took more of an overall business role reflecting her experience in the area of sales.

The expansion of EazyStock entailed that the role of a marketer was added to the team to support in the relationship development process. Furthermore, the Swedish team has been strengthened through the involvement of two Customer Success Managers. These individuals hold technical expertise that allow them to play a similar role to that previously taken by the Head of EazyStock in the relationship with Exsitec. Elaborating on the make-up of the Swedish team, the Head of EazyStock emphasizes the importance of the team to contain people with different expertise: “I think first of all we need to have different expertise in different people and I honestly think that in Sweden we have a really strong team”.

**An interplay of team members’ expertise**

EazyStock recently initiated two new relationships with the companies EA System and Zedcom. The Head of EazyStock describes the Head of Global Partner Strategy to have been
the one who was first in contact with these companies. Considering the relationship with EA System he further explains that the Head of Global Partner Strategy involved one of the Customer Success Managers, due to that person’s complementary knowledge in regard to the technical character of their product. The technical expertise provided by the Customer Success Manager is described to have contributed to that person being “naturally involved” in the relationship.

This is confirmed by the Head of Global Partner Strategy who describes the different roles taken by her and the Customer Success Manager 1: “That was the setup that we took, me leading or taking on the sales hat and having the sales role and him [Customer Success Manager 1] rather the product and implementation role and coming with the expertise”. In line, the Customer Success Manager 1 perceives himself and the Head of Global Partner Strategy to possess different expertise, as he describes her to hold knowledge of the commercial aspects in the sales process, while he brings the technical experience. Moreover, he emphasizes the sales process to require the involvement and combination of their different areas of expertise.

In the role of Swedish marketer, the Head of Global Marketing is normally not part of the early conversations with partners. Instead, she describes that either the Head of Global Partner Strategy or any of the Customer Success Managers would involve her “when the time is right”, which would typically be a bit further into the relationship. Considering the newly established relationship with EA System she explains that: “We actually decided to wait a little bit with pushing the marketing buttons, so again, the person responsible for this account, or for this partner, is going to involve me when the timing is right…”

Like the sales process, the marketing activities carried out by the team illustrate an example where the expertise of members interplay. The Customer Success Manager 1 describes how the Head of Global Marketing and himself conducted a webinar a few weeks earlier where the discussion revolved around future industry trends. To prepare for the webinar, they discussed what could be relevant topics and the Head of Global Marketing was further responsible for organizing the slides and the overall structure of the webinar. The Customer Success Manager 1 explains that: “She prepared the slides, we both had some inputs on what we should talk about and during the actual webinar I was the expert and she was asking questions, so that’s how we set it up”. The Head of Global Marketing further describes that the team regularly attends different industry events to market EazyStock. In these situations, she is responsible for
the coordination and planning but she is not necessarily present at the events. Instead, other team members could represent EazyStock after having been briefed by the Head of Global Marketing. Reflecting the above, the Customer Success Manager 2 emphasizes that team members are confident in their roles and in working independently, still she describes that they “have a need for being in the team to use each other’s expertise and thinking and mindset”.

An increased need for coordination and communication

As EazyStock’s business has grown and the number of partners increased, the Head of Global Partner Strategy describes that it requires them to devote more time to coordinate the activities of the Swedish team:

“So before we had like half an hour on Fridays and now we recently said, it's better to start the business week so we meet at 10 every Monday and we go through all the business that we currently have with different partners and then we also talk about the activities that we are running, who does what, are there any problems we need to solve…” (Head of Global Partner Strategy)

All informants highlight the Monday meeting during the interviews. It is described to constitute an important occasion to bring up aspects concerning the Swedish team and its work in relation to partners. In the meeting observed by the researchers, the team went through their current sales to ensure that they would be able to reach their targets in the coming months. They further discussed ideas for future activities in regard to different partners. Moreover, some team members brought up potential issues in relation to partners, to receive input from the others. The latter is further elaborated on by the Customer Success Manager 2, who describes the meeting to give them the possibility to exchange insights and knowledge in regard to possible issues:

“We still have different areas where we have different expertise and within the meeting that we had this morning there are different ways I can provide with knowledge, and get knowledge from the other ones as well.” (Customer Success Manager 2)

During the observed meeting the team made use of specific templates that are part of the digital system Salesforce. These templates give them the possibility to review their targets in regard to partners and customers and to “track every opportunity”, as noted by the Global Head of
Customer Success. The informants further describe the meeting to enable the team to make decisions together and to ensure that everyone is kept in the loop. The Head of Global Marketing emphasizes how she tries to “save the discussions for the weekly meetings”. She explains that she typically has a casual dialogue with different members of the Swedish team throughout the week to prepare for the meeting. Still, striving to make the decisions at the formal occasion when everyone is present. Moreover, the Monday meeting is described to provide a valuable opportunity for the team to “take the time to actually talk through what’s going on”, as depicted by the Customer Success Manager 2. In line, the Head of Global Marketing emphasizes the importance of the meeting:

"And those meetings are really, the more I think about it, the more I realize how important they are for us to actually keep on the same page because it’s always easier to talk. It’s so much I think nowadays focused on tools and processes and everything is digital and you should have everything updated everywhere. In the end, just getting that hour every week, just to sit down and talk, it’s so valuable." (Head of Global Marketing)

In addition to the weekly meeting, the less formal, ongoing conversation is emphasized by informants. To exemplify, the Head of EazyStock explains that he and the Head of Global Partner Strategy talk almost every day and that there is an ongoing dialogue between them. The Head of Global Partner Strategy further emphasizes the informal conversations in the office to keep the team informed in regard to what is happening in the different relationships with partners:

“Then we talk to each other, you know, the informal discussions in an office, like “Oh, now he called and he said this and that”, to make sure that everyone is, that is super important, the informal talk about things.” (Head of Global Partner Strategy)

The Customer Success Manager 2 adds an additional perspective to the above, highlighting that although informants’ titles indicates a hierarchy, she has the possibility to interact with all team members, including the Head of EazyStock. She explains that: “I interact with them [the other team members] in so many different ways. We have meetings, but it’s also chit chatting and [name of another informant] is the Head of EazyStock, but he’s also a person that I can go direct to and have some sort of brainstorming with...”. Following from this, the Customer
Success Manager 2 emphasizes that the Head of EazyStock provides her with guidance, but that it also works the other way around.

The team further uses Microsoft Teams, a digital program allowing them to communicate through chat messages. The Head of Global Marketing explains that she uses Microsoft Teams when another team member is not present in the office, as well as when she does not want to interrupt that person in its ongoing work. The Customer Success Manager 1 further describes Microsoft Teams to be an important communication tool in which they make use of both group chats and one-to-one chats.

**Goals, targets and “partner thinking”**

The Head of EazyStock describes that quantitative goals, or targets, are set on a yearly basis for the overall organization. These are further broken down in regard to each region, where the regional teams agree on a plan for how to reach the monetary goals. In practice it entails setting sales targets in relation to EazyStock’s different partners, which are reviewed on a weekly basis as demonstrated by the team during the observed meeting. Discussing the overall goal that the team should strive towards, the Head of Global Partner Strategy stresses the importance of talking about this within the team as she describes: “To get this vision, that is something you need to talk about often, you need to sell the concept all the time”.

The Head of Global Partner Strategy further explains that the Swedish team is changing its overall strategy. From having sold both directly and through partners, it now attempts to sell everything via partners. As she describes, this implies getting the team “into this partner thinking”. Within this process, she emphasizes the experience of the Customer Success Manager 1 to be valuable, as he used to work for one of their current partners. Resulting from that he brings an understanding for this form of strategy, as well as concrete tools on how to talk the partners’ language. Also the Head of EazyStock stresses that the team has to have a common understanding of the strategy it is relying on. He further means that this should be something the team agrees on and believes in:

“So for me, it’s very important to get people involved in what we do and believe in what we do and agree on this. You don’t agree on everything but you have to agree on, you have to have a joint understanding on this is the concept we are going to rely on. If you don’t have that I think
you probably will not be very successful, so to me it’s very important to get everybody on board on that.” (Head of EazyStock)

The Head of Global Partner Strategy further highlights the communication among team members to signal whether they have a common understanding of their goal or not. However, she explains that she has not perceived that to be an issue because, as she describes: “You can feel when we talk that we see basically the same goal I would say”. The Customer Success Manager 1 adds an additional perspective highlighting that the interactions among team members prevent them from moving in different directions, but enhance their alignment:

“Since everybody is doing a little bit of everything, we have a lot of interactions and things together with each other so it’s not that one can go in that direction (pointing in different directions), since we work so much in this team together we walk in the same direction I think.” (Customer Success Manager 1)

In this context, the Global Head of Customer Success further means that a shared vision is key to enable employees to take their own initiatives, as he describes that: “I think if you’ve got a shared vision in an organization then you’re on the same journey as your colleagues and it’s easy to be alight and it’s easy to be active because you all know where you’re going”.

**Structuring the team’s internal work**

The interviews with informants highlight that the functional teams have different tools and routines to help structure their work. To exemplify, the Head of Global Marketing depicts that the global marketing team has their own project management tool that assists them in planning the overall marketing activities. She further explains: “But we don’t have that so much in the Swedish team settings, we are very much relying on talking to each other and doing that on a weekly basis”. According to the Head of Global Marketing, the closeness of the Swedish team enables such an approach, in contrast to the geographically dispersed functional teams that requires the application of more structured tools.

While emphasizing the less structured procedures in the Swedish team, the Head of Global Marketing mentions that they have started to develop partner plans, entailing that it should be clear who is primarily responsible for each partner. Likewise, the Head of Global Partner Strategy describes that they have recently started to formalize how they work internally in the
team. She explains that it is not about changing the way they work, but rather to make their roles and processes more explicit, as part of ensuring that they stay aligned. Further, she stresses that she does not want to add additional meetings or heavy processes, but to "have some sort of structure so we document: these are the activities that we’ve been doing, this is where we are with this partner, so we can always go back to that…". An example of a partner plan was presented to the researchers during the observed meeting. This document specified the different procedures in relation to the partner and stated the names of responsible members from the EazyStock team.

Elaborating on the above topic, the Customer Success Manager 2 means that there has to be a balance between formalization and flexibility as she describes: "I cannot be too controlled because then I lose my flexible mindset". In favor of the structured dimension, the Head of Global Marketing means that clarifying who is in charge of each partner would allow the Swedish team to stay focused and updated on what is going on in each of their partner relationships. Adding to this, the Global Head of Customer Success describes that such an approach makes it possible for the Customer Success Managers to build closer relationships with their assigned partners. Linked to the above, the Customer Success Manager 2 mentions the recently developed partner onboarding process, described to explicitly state the steps associated with onboarding new partners.

The newly initiated relationships with EA System and Zedcom could illustrate as examples where the above aspects are starting to discern. The Customer Success Manager 1 explains that they have divided these partners between himself and the other Customer Success Manager: "So I will mostly work with EA Systems and she [Customer Success Manager 2] with Zedcom. I think that’s the plan". As described earlier, the Head of Global Partner Strategy is usually the person within the team who initiates contact with potential partner companies. Further, as the relationships with partners evolve, all informants emphasize how the responsibility of partners shifts. In the case of EA System, the Customer Success Manager 1 describes that the Head of Global Partner Strategy was initially the partner’s contact person, but as the relationship matures he is now starting to take on this role within the Swedish team. The Head of EazyStock illustrates this process in relation to the two recently established relationships with EA System and Zedcom:
“So one of the Customer Success Managers got involved because they had the expertise and then it turned naturally that they were the go-to person, so that’s how the relationship evolves. Someone has to be out there and hunt for new partners and that’s the job of the Head of Global Partner Strategy and once she has someone on the hook she needs to involve somebody that is an expert on our software and that would be one of our Customer Success Managers.” (Head of EazyStock)

In line, the Customer Success Manager 2 describes that the Head of Global Partner Strategy “steps down” when there is a need for more detailed explanations about the product. In this phase of the relationship, the Customer Success Managers have more extensive knowledge and are therefore more suitable to manage the partner relationships. Also, the Global Head of Customer Success describes that the early stage of the relationships with partners contains strategic and commercial aspects requiring the involvement of the Head of Global Partner Strategy. While the responsibility would later on shift towards one of the Customer Success Managers, handling the practical day-to-day issues.
5. Analytical discussion

In this chapter the empirical findings are analyzed through the application of the analytical lens. To begin, in section 5.1 emphasis is put on formalization and heterogeneity, reflecting the team’s design. These concepts are understood to form the basis for how the team works internally and thereby set the conditions for the processes carried out. With an awareness of how formalization and heterogeneity are reflected in the context of the Swedish EazyStock team, the analysis turns to consider the team processes in section 5.2. These involve the process of communication, the process of proactiveness and the process of alignment of goals. In addition to highlighting how the different processes are expressed within the team, the analysis emphasizes the linkages between processes. Lastly, in section 5.3, the analysis is synthesized as the conceptual framework is presented.

5.1 Formalization and heterogeneity setting the conditions

Reflecting the design of the Swedish EazyStock team, formalization and heterogeneity could be seen to set the conditions for how the team processes are carried out. The analysis below highlights how these concepts are depicted in the team, firstly emphasizing formalization and secondly the heterogeneity of team members’ expertise.

5.1.1 Formalization

Considering formalization in the context of key account management, Homburg et al. (2002) emphasize whether the treatment of the company’s customers is characterized by formal routines. In the case of the Swedish EazyStock team, the notion of formalization depicts a current topic as the team has started to articulate their roles and procedures. According to the literature, elements of formalization could be illustrated in formal documentation processes and guidelines on how to manage the key accounts (Homburg et al., 2002; Salojärvi et al., 2010; Workman et al., 2003). This corresponds to what is starting to discern within the Swedish team. To exemplify, the partner onboarding process demonstrates how the routines in relation to customers have been formalized. Furthermore, the process of assigning a certain Customer Success Manager to each customer, and thereby making their roles more explicit, illustrates how elements of formalization are added to the team design.

While all informants highlight those steps towards formalization, many of them at the same time emphasize the flexibility currently characterizing their internal work. In this context, the
paradox associated with formalization could be illustrated as team members express benefits related to a more formal approach but also the limitations it may bring. To demonstrate, informants connect formalization to an enhanced focus and alignment of the Swedish team, as well as an ability to build closer relationships with customers. However, there is a fear of this to tip over, entailing heavy processes that limit the flexibility of team members and inhibit their work. This is in line with the risks stressed by Workman et al. (2003), who regard the formalization of the KAM approach to negatively affect performance.

As highlighted by Vanharanta et al. (2014) the design of the team could vary from involving formal to less formal dimensions considering the current situation of the organization. Applied to the Swedish team the evolvement of EazyStock, entailing an increasing number of team members, could be understood to have triggered the strive towards more explicit procedures. Such a development is in line with what Vanharanta et al. (2014) describe could be beneficial when implementing practices associated with key account management. However, as highlighted, there is a risk of being caught up in procedures, preventing the team from being flexible in regard to their customers. Reflecting one part of the team’s design, the increased formalization could be seen to set conditions for the processes carried out. As emphasized by informants this involves positive aspects, but also the risk of formalization to restrict the flexibility of the team’s processes.

5.1.2 Heterogeneity
Turning to consider heterogeneity, it has been emphasized in connection to teams consisting of members with different expertise and knowledge (Atanasova & Senn, 2011; Moon & Armstrong, 1994; Weitz & Bradford, 1999). This reflects the design of the Swedish team as it involves members with diverse areas of expertise. To illustrate, the team consists of people with marketing, sales and technical knowledge. This is further highlighted by the Head of EazyStock as he stresses the importance of the team to include members with different expertise. Moreover, it could be connected to the notion of skill-differentiated teams where everyone’s unique knowledge is considered essential for the team’s outcome (De Jong et al., 2016). Applied to the Swedish team, this reflects the evolvement of the team as new members have been included in order to complement the team’s overall knowledge.

The heterogeneity of the Swedish team could further be seen to create interdependencies among team members. This is in line with the suggestion by Weitz and Bradford (1999), emphasizing
the connection between task interdependency and teams consisting of members with different knowledge. The Customer Success Manager 1 highlights two situations in which such task interdependency is depicted. The first involves the selling process that requires both the commercial expertise possessed by the Head of Global Partner Strategy and the technical knowledge provided by himself. The second example concerns the marketing activities, as the Customer Success Manager 1 describes that the Head of Global Marketing regularly invites him to participate in such events. Reflecting the above, the Customer Success Manager 2 emphasizes how members of the Swedish team rely on each other for input and expertise.

While heterogeneity has sometimes been connected to increased conflicts among team members (Stewart, 2006), the Swedish team does not appear to represent this argument. In contrast, informants consider their differences to positively influence their ability to meet the different requests from customers. The Customer Success Manager 2 further highlights that holding different expertise contributes to their need to work as a team. In this way, team members feel a necessity to use each other’s knowledge and to be open to others’ thinking and mindset. In addition, the knowledge possessed by members of the Swedish team overlaps in some areas which could be seen to enhance the understanding among them. This corresponds to the argument of Weitz and Bradford (1999), suggesting that shared knowledge should facilitate the work of people with different perspectives. As emphasized above, the heterogeneity of team members’ expertise creates interdependencies among them that in turn form the basis for how they interact. Reflecting the second part of the team’s design, the heterogeneity of expertise could thereby, like formalization, be seen to set conditions for the processes carried out.

5.2 The linkages between processes

The below sections emphasize how the different processes are depicted in the context of the Swedish EazyStock team. In line with the understanding of team processes to be closely related to the interactions among team members, the analysis further highlights the linkages between processes. To begin, the process of communication is considered. It is followed by the process of proactiveness and finally, the process of alignment of goals.
5.2.1 The process of communication

Communication has been described in terms of modality, entailing the differentiation between formal and informal communication manners (Peters & Fletcher, 2004; Schultz & Evans, 2002). Applied to the Swedish EazyStock team, both types of communication could be depicted. To exemplify, the Monday meeting demonstrates how communication is carried out in a formal manner. As described by Lai and Yang (2017), the meeting entails a formal setting in which information is shared in a structured way. Moreover, such formal communication is argued to facilitate coordination and joint decision making (Lai & Yang, 2017). This is in line with the situation highlighted by the Head of Global Marketing, describing that she tries to save the decisions for the weekly meeting. The example could further be seen to illustrate a link between communication and the alignment of goals, as the meeting provides an opportunity for team members to agree on smaller, as well as more strategic issues.

Turning to consider informal communication manners, it is associated with more spontaneous and unstructured exchanges (Lai & Yang, 2017). This corresponds to the casual discussions described by informants. To demonstrate, the Head of Global Partner Strategy emphasizes the importance of the informal discussion in the office to ensure that all team members are kept informed. Also the Head of Global Marketing stresses the casual dialogue, indicating that the discussions are not limited to the weekly meeting but continue throughout the week. The examples highlight that communication and the alignment of goals are not only linked together in the more formal settings, but also in situations characterized by informal communication manners. In addition to the face-to-face interactions, the Swedish team makes use of the digital program Microsoft Teams. This approach involves written modes of interaction, associated with formal communication manners. However, it could also be seen to include spontaneous exchanges of information, entailing that it reflects elements of both formal and informal communication.

Informal communication has further been connected to collaborative communication associated with positive team outcomes (Peters & Fletcher, 2004). In this context, emphasis is put on the content of the messages exchanged. The Customer Success Manager 2 describes her interactions with the Head of EazyStock as two-ways. This corresponds to content reflecting the sharing of opinions, rather than content in the form of orders and instructions. Moreover, discussions that cover more strategic aspects are described to involve strategic content (Schultz & Evans, 2002). The Monday meeting demonstrates an example in which such strategic content is exchanged.
However, the more informal conversation between the Head of EazyStock and the Head of Global Marketing, carried out in connection to establishing the relationship with the company Exsitec, could also be seen to have involved strategic content.

5.2.2 The process of proactiveness

The empirical findings demonstrate elements of proactiveness that are similar to how the concept has been described in earlier works (Atanasova & Senn, 2011; Crant, 2000; Hyatt & Ruddy, 1997; Kirkman & Rosen, 1999; Murphy & Coughlan, 2018; Wang et al. 2017). To exemplify, the discussions at the Monday meeting depict how the team together goes through future activities and potential issues in regard to customers. This corresponds to how proactiveness has been portrayed as addressing issues at an early stage (Hyatt & Ruddy, 1997), as well as planning ahead and capturing opportunities (Murphy & Coughlan, 2018). Along with the conceptualization of proactiveness as a team process (Atanasova & Senn, 2011), proactiveness in the context of the Swedish team is considered on a group level (Atanasova & Senn, 2011; Hyatt & Ruddy, 1997; Kirkman & Rosen, 1999). Further, applied to the case studied proactiveness is understood as a team behavior (Hyatt & Ruddy, 1997; Wang et al., 2017), rather than as an individual characteristic (Murphy & Coughlan, 2018). The latter is due to the understanding of team processes to be closely related to interactions, entailing that proactiveness on part of the Swedish team is depicted as a result of the interactions among team members. The proactive behavior arising from the discussions at the Monday meeting is an example of this, reflecting a link between communication and proactiveness.

In addition to proactiveness being demonstrated in ways similar to those emphasized in previous articles, the internal work of the Swedish team illustrates a further way in which proactiveness is expressed. As the relationships with customers evolve, informants highlight how the main responsibility of the customer shifts within the Swedish team. From initially being in charge and leading the initiatives in relation to customers, the Head of Global Partner Strategy steps down and hands the responsibility over to one of the Customer Success Managers. The situation described depicts how proactiveness could be seen to shift within the team. The notion of proactiveness to shift within the Swedish team might seem contradictory to the understanding of proactiveness as a team behavior. However, considering the case studied, the shift does not imply that some team members are no longer behaving proactively. Rather, it highlights how proactiveness in relation to certain customers and responsibilities
shifts due to how the team has organized their work. This in turn makes it possible for team members to focus their attention and proactive behavior on certain aspects. Further, reflecting the conditions set by the team’s design, the formalization of team members’ roles entailing who is responsible for each customer could be seen to enhance the process of shifting proactiveness within the team.

5.2.3 The process of alignment of goals

The activities carried out by the Swedish team are to some extent guided by the monetary targets established in relation to customers. In line with the emphasis of Atanasova and Senn (2011), these targets are aligned with the overall goals of the organization. Although informants mention the quantitative goals, what is accentuated is the common and more overall understanding of where the team is aiming. In this context, informants refer to the broader “vision” or “concept” that they rely upon, depicted by one informant as the “partner thinking”. Considering the strategic importance of EazyStock’s relationships with other companies, establishing such partnerships could be seen to play a key role for the team.

To continue, Marks et al. (2001) highlight how verbal discussions are essential to align team members’ vision. This is in line with the viewpoint brought forward by the Head of Global Partner Strategy, emphasizing the importance of continuously talking about and selling the vision within the team. The communication among team members is further perceived by informants as a way of identifying whether the team holds a common understanding. This could further be connected to the notion of shared values, entailing a common view of what goals are important (Morgan & Hunt, 1994).

In addition to communication contributing to the alignment of a common vision, members’ heterogeneity and the resulting task interdependency could be seen to enhance the team’s alignment. To exemplify, the latter is illustrated by the Customer Success Manager 1 emphasizing how the interactions required among team members prevent them from moving in different directions. The selling process carried out in relation to customers and the marketing activities involving multiple team members demonstrate as examples of such interdependency. Accordingly, Stewart (2006) argues that highly interdependent teams call for members working closely together, which is suggested to enhance the evolvement of common norms. High intrateam coordination resulting from interdependency is further suggested to encourage a
notion of esprit de corps. In addition to involve an obligation towards common goals, esprit de corps is associated with feelings of belongingness to a team (Salojärvi & Saarenketo, 2013). Taking into account that EazyStock is organized as a matrix could possibly discourage this feeling among the Swedish team members, as they are part of several teams. Still, the continuous interactions among members, resulting from the interdependencies between them, could be seen to contribute to the alignment of the Swedish team. This further illustrates how the heterogeneity of team members’ expertise sets conditions for the processes carried out.

Highlighting the linkages between processes, the interviews further illustrate a link between alignment of goals and proactiveness. To demonstrate, the Global Head of Customer Success argues that a shared vision enables team members to be alight and active as everyone has a shared understanding of where the team is heading. This corresponds to the viewpoint maintained by Parker et al. (2010), emphasizing the connection between goal-setting and proactiveness.

5.3 Towards the development of a conceptual framework

The purpose of this study has been to develop a conceptual framework emphasizing the intraorganizational perspective of sales teams. In an attempt to bring insights to this, the design and processes of such a team has been explored and analyzed. On that basis, this section presents the suggested conceptual framework, illustrated in figure 1 below. In addition to introducing the framework the below section provides insights to the research question: How does an intraorganizational sales team in the cloud software industry work internally to build relationships with its customers? In this way, the applicability of the conceptual framework is demonstrated.

As emphasized in the analysis, the formalization and the heterogeneity of team members’ expertise could be seen to form the basis for how the team works internally. The design of the team, involving formalization and heterogeneity, is therefore suggested to constitute the frame in which the team processes are carried out. The formalization of the team, involving members’ roles and the internal procedures, represents one part of this frame. In the case studied, the increased formalization enhanced the team’s ability to behave proactively in relation to its customers, demonstrating how changes to the team’s frame impact its processes. The other part of the frame is set by the heterogeneity of team members’ expertise, generating
interdependencies within the team that in turn create conditions for team members’ interactions. Reflecting the above, the light grey square in the conceptual framework is understood to represent this frame.

Turning to consider the team processes, communication, proactiveness and alignment of goals showed to constitute key processes for the intraorganizational sales team. The different forms of communication carried out formally in meetings and informally in the office could be seen to contribute to the team being able to align and organize their efforts in regard to customers. Further, a proactive team behavior and the ability to shift proactiveness among team members made it possible for the team to focus its attention in relation to customers. Lastly, the alignment of goals demonstrated an importance in order to ensure that team members had a common understanding of its overall purpose. For the intraorganizational sales team, a “partner thinking”, reflecting an orientation towards customers was especially highlighted. The analysis further highlights the linkages between these processes, demonstrating how they can be seen to interplay as they enable the team to build relationships with its customers. In the conceptual framework, the interplay of processes is depicted by the lines connecting the three processes together.

![Figure 1. Conceptual framework illustrating the interplay of processes within the frame of the intraorganizational sales team’s design.](image_url)
6. Conclusion

This final chapter starts by emphasizing the theoretical contribution of the study. It is followed by implications for managers in section 6.2 and a discussion in regard to the study’s limitations in section 6.3. Lastly, suggestions for future research are highlighted.

6.1 Theoretical contribution

This study has addressed an area within sales and key account management argued to have been overlooked, namely the intraorganizational setting (Bolander & Richards, 2018; Ivens et al., 2016; Steward et al., 2010). By exploring the design and processes of a sales team, the study provides insights into the intraorganizational perspective of such teams, and it does so by the contribution of a conceptual framework. As described in connection to figure 1, this study suggests the design of the team to constitute the frame in which the processes interplay. Making use of this conceptual framework allows us to approach the intraorganizational sales team and to understand how it works internally to build relationships with its customers. Visualizing the team’s design as the frame in which the processes are carried out illustrates how the formalization and heterogeneity of the team set conditions for its internal work. The formalization of the team makes up one part of this frame, whereas the other part is represented by team members’ heterogeneity, setting conditions for members’ interactions and the team processes.

In addition, the study addresses the request of Atanasova and Senn (2011), suggesting that future research should build upon their findings to deepen the understanding of team processes within this context. In regard to this, the conceptual framework highlights that the processes are not carried out independently, but that an interplay of processes enables the team to build relationships with its customers. In this way, the study could be seen to expand the understanding of team processes as it recognizes the interplay among them. To exemplify, the continuous interactions within the team showed to enable a common “partner thinking”, entailing an interplay of communication and the alignment of goals. Further, a shared understanding of where the team is heading, reflecting the alignment of goals, could be seen to enhance proactiveness in relation to customers. The latter example illustrates an interplay of the alignment of goals and proactiveness. Moreover, the discussions in the common meeting helped the team to focus its attention in relation to customers, reflecting an interplay of communication and proactiveness.
Furthermore, this study extends the use of proactiveness as the empirical findings demonstrate an additional way in which the process may be illustrated. This entails the process of shifting proactiveness among team members. Proactiveness has earlier been applied to either a group level (Atanasova & Senn, 2011; Hyatt & Ruddy, 1997; Kirkman & Rosen 1999) or an individual level (Crant, 2000; Murphy & Coughlan, 2018). Still, these applications do not involve the notion of proactiveness to shift among the individuals of the group. As depicted in the case studied, the process of shifting proactiveness among team members allowed them to focus their attention and proactive behavior in relation to customers. Further, the formalization of team members’ internal roles could be seen to enable such a shift of proactiveness within the team.

By adopting a qualitative research design, this study stands in contrast to many quantitative studies conducted in the field (e.g. Atanasova & Senn, 2011; Arnett et al., 2005; Bolander & Richards, 2015; Üstün & Iacobucci, 2012; Workman et al., 2003). Making use of a qualitative approach is in line with the suggestion by Jones et al. (2005, p. 193), maintaining that “more qualitative research would increase our understanding of team selling and its variants, such as key account management”. The character of the qualitative research design has in turn allowed this study to add an intraorganizational perspective to the understanding of sales teams.

### 6.2 Managerial implications

The study further highlights aspects of importance from a managerial perspective. Firstly, it directs attention towards the intraorganizational setting and the role it could be seen to play in the overall context of establishing relationships with the company’s customers. The empirical findings of this study illustrate that the team has a tendency to focus on their external tasks in relation to customers and to look outward, rather than inwards. Such an approach is in line with earlier research in this area, argued to mainly have emphasized the interorganizational perspective (Bolander & Richards, 2018; Bolander et al., 2015; Ivens et al., 2016; Steward et al., 2010; Workman et al., 2003). By highlighting how the team’s design and internal processes could be seen to form the basis for how the team copes with their customers, this study contributes to counterbalance this focus. Making use of an example from the case study, the formalization of the team’s procedures and roles enabled for the shift of proactiveness, that in turn made it possible for the team to focus their attention in relation to customers. The example
illustrates how a company’s relationships with customers may benefit from including an inward focus, thereby providing implications for managers.

Secondly, the study puts emphasis on managers to adopt a holistic perspective as they take decisions in regard to the intraorganizational sales team. Considering the team’s design to constitute the frame in which the processes are carried out, changes in the design should be expected to impact the team processes. To exemplify, the case studied demonstrates how the level of formalization is changing, enhancing the team’s ability to behave proactively. Further, the interplay of processes, entailing that there are interdependencies between them, implies that also changes in regard to the different processes should be considered from an overall view. Thirdly, the empirical findings illustrate an additional way in which proactiveness can be practiced. The process of shifting proactiveness among team members showed to enable the team to focus its efforts in regard to customers. Consequently, the practice of deliberately shifting proactiveness should be a tool useful for teams in similar contexts. Finally, as emphasized by Day (2000) this study confirms the importance of establishing an overall relationship orientation, or “partner thinking”, within the team.

6.3 Limitations of the study

An inherent limitation of this study lies in the inability to generalize the conclusions to a wider context. Resulting from the single case study focused on one intraorganizational sales team, generalizability to population is not possible. Furthermore, the study adopts an abductive approach, meaning that it was partly guided by earlier frameworks and concepts used within this area of research. Although this made it possible to contribute to the theoretical discussion in the field, it could be argued to also have limited the perspective of the study. To illustrate, approaching the intraorganizational sales team through the lens of team design and team processes provides one possible perspective. However, making use of another theoretical framework could have generated different insights.

Further, the case study was conducted within a relatively short time span, entailing that the researchers only meet with informants a few times. This could imply the risk of the empirical findings to reflect a somewhat polished view, as informants may have emphasized the positive aspects. This issue could have been addressed by adopting a longitudinal study, allowing
informants and researchers to develop a closer and more trustful relationship. That in turn could have revealed additional aspects of the team’s design and processes.

6.4 Directions for future research

As described above, this study suggests the design of the team to constitute the frame in which the processes interplay. Thereby, the design is emphasized to impact the processes, but not the other way around. To extend the understanding of the relation between the team’s design and processes, future research could examine the possible interplay of the design and processes. Furthermore, this study was conducted within a small organization that had established relationships with a handful of customers. The design and processes of this specific team could consequently be understood to have evolved to fit this context and the demands of these customers. Future research could apply the understanding of the team’s design and processes to additional contexts, such as to larger organizations or teams working with different types of customers. This could possibly generate insights into how the team’s internal work is impacted by its context and the character of its customers. An additional suggestion for future research involves examining the relative importance of the team processes emphasized in this study. Adopting a quantitative research design would allow assessing the role of each process carried out by the intraorganizational sales team, which could provide further directions for practitioners in this field.
References


## Appendix 1

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<td><strong>Formalization</strong></td>
<td>Homburg et al., 2002; Salojärvi et al., 2010; Vanharanta et al., 2014; Workman et al., 2003</td>
<td>Formal rules, standard procedures, formal expense budgets, documentation processes, guidelines on how to treat the key accounts, internal communication channels.</td>
<td>How do you organize the team’s internal work?</td>
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<td>Follow-up questions:</td>
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<td>- Do you follow any internal guidelines?</td>
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<td>- Do you assemble or document the work you do in relation to customers?</td>
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<td>- Do you have budgets related to specific customers?</td>
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<td><strong>Heterogeneity</strong></td>
<td>Atanasova &amp; Senn, 2011; De Jong et al., 2016; Lai &amp; Young, 2017; Stewart, 2006; Weitz &amp; Bradford, 1999</td>
<td>Members with different knowledge, expertise, competencies and skills, belonging to different functions within the company. Team members dependent on reciprocal inputs.</td>
<td>Could you please describe your background and your current role at EazyStock?</td>
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<td>Follow-up questions:</td>
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<td>- Could you give examples of tasks that you carry out?</td>
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<td>- Are other team members involved in those, if so, how?</td>
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<td><strong>Communication</strong></td>
<td>Lai &amp; Yang, 2017; Peters &amp; Fletcher, 2004; Schultz &amp; Evans, 2002</td>
<td>Communication manners being formal (meetings, written) and informal (spontaneous, unstructured). Content in the form of orders and instructions, or sharing of opinions and information, or strategic meanings.</td>
<td>How do you keep other team members informed of upcoming and ongoing activities?</td>
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<td>Follow-up questions:</td>
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<td>- In what different ways do you communicate within the team?</td>
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<td>- Do you have any regular meetings? If so, could you describe what such a meeting could look like?</td>
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<td><strong>Proactiveness</strong></td>
<td>Atanasova &amp; Senn, 2011; Crant, 2000; Homburg et al., 2002; Hyatt &amp; Rudy, 1997; Kirkman &amp; Rosen, 1999; Murphy &amp; Coughlan, 2018; Parker et al., 2010; Wang et al., 2017</td>
<td>Addressing issues before they evolve into problems, continuously reviewing work processes, actively trying to identify areas for improvement, taking the initiative to activities in relation to customers, planning ahead, capturing opportunities, taking charge.</td>
<td>Considering the relationship with customer X, how have you worked internally within the team?</td>
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<td>Follow-up questions:</td>
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<td>- Has different people from your team been involved as the relationship with the customer has evolved?</td>
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<td>- Who has been taking charge and driving initiatives internally within the team?</td>
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<td><strong>Alignment of goals</strong></td>
<td>Atanasova &amp; Senn, 2011; Heide &amp; John, 1992; Marks et al., 2001; Morgan &amp; Hunt, 1994; Salojärvi &amp; Saarenketo, 2013; Stewart, 2006; Workman et al., 2003</td>
<td>Verbal discussions to ensure shared vision, common understanding of what goals are important, what behaviors and policies are suitable, feelings of obligations to common goals and belongingness to the group.</td>
<td>How do you establish goals or targets within the team?</td>
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<td>Follow-up questions:</td>
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<td>- Who are involved in this process?</td>
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<td>- How do you make sure that everyone has a common understanding of the team’s vision?</td>
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Appendix 2

Interview guide

Thank you for taking your time to meet with us.

Introduction to the study:

To give you an introduction to the subject, we have focused on the sales and marketing relationship literature, where they emphasize how relationships are established between the selling company and its customers. The recent understanding is that the selling process takes place in teams, with the involvement of employees with different areas of expertise. Following from this there is an interest to better understand how this intraorganizational sales team work, and what are important aspects for its success – which in turn is argued to influence the relationship with business partners. According to this, we will ask questions to understand how the Swedish EazyStock team interacts and works internally throughout the process of developing relationships with your customers. When responding to the questions, we encourage you to describe the team’s internal work in relation to the relationship development process with customers, to be able to link your answers to concrete situations that have taken place.

Ethical considerations:

Would it be ok if we record the interview? We will be the only ones listening to the recording and they will be deleted after we have finished writing the thesis. When we have transcribed the interview we are happy to share it with you so that you can approve it. The full transcript will not be part of the thesis, but we will pick some citations to include. According to how you feel later in the process, EazyStock can be made anonymous.

- Could you please describe your background and your current role at EazyStock?
  - Could you give examples of tasks that you carry out?
  - Are other team members involved in those, if so, how?

- Could you please draw your EazyStock team and describe how you relate to each other?
  - How do you organize the team’s internal work?
  - Do you follow any internal guidelines or routines?
  - Do you assemble or document the work you do in relation to customers?
- Do you have budgets related to specific customers?

- How do you keep other team members informed of upcoming and ongoing activities?
  - In what different ways do you communicate within the team?
  - Do you have any regular meetings? If so, could you describe what such a meeting could look like?

- How do you establish goals or targets within the team?
  - Who are involved in this process?
  - How do you make sure that everyone has a common understanding of the team’s vision?

- Considering the relationship with customer X/Y/Z, how have you worked internally within the team throughout the relationship development process?
  - Who was involved?
  - What role did you take?
  - How did you interact within the EazyStock team?
  
  - Has different people from your team been involved as the relationship with the customer has proceeded?
  - Who has been taking charge and driving initiatives internally within the team?
  - Do you strive to take initiatives in relation to customers or are you waiting for the customer to do so?

- When looking back at the customer relationships that you have talked about, do you recognize any differences considering how you worked internally?

- Do you see any success factors considering how you work internally?

Thank you for your participation. If any follow-up questions would arise, would it be ok if we got back to you?