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Transforming sales: business-to-business value co-creation. How organizations and people collaborate, learn, co-create value, and develop 'fit for the future' sales professionals

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Transforming Sales: Business-to-Business Value Co-Creation

*How organizations and people collaborate, learn, co-create value,
and develop 'fit for the future' sales professionals*

A critical commentary and public works submitted to

Middlesex University

in fulfilment of the requirements for the degree of

Doctor of Professional Studies by Public Works

(Transdisciplinary Practice)

Faculty of Business and Law

Names: Philip Styrlund & James Robertson

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Month and Year: December 2022

Disclaimer: <i>The views expressed in this document are ours and are not necessarily the views of our supervisory team, examiners, or Middlesex University.</i>

Gratitude

Phil Styrlund

For my Mother, who deeply valued education and sacrificed to assure her children were educated

James Robertson

*To my parents, wife and son who have instilled in me the curiosity and motivation to always be
learning and growing*

Acknowledgements

Prof. Brian Sutton, Professor of Learning Performance, Faculty of Business and Law

Personal transformation precedes team transformation which creates organizational and societal transformation. We have been truly transformed in our thinking and perspective as a direct result of this Doctorate journey. We also recognize that our transformation was a result of a transformer, Professor Brian Sutton.

His wisdom, perspective, patience, and guidance have been providential and pivotal to the reshaping of our minds. He got us.

Brian knew we were seeking to learn and expand our perspectives, as well as keep our firm, The Summit Group, healthy and growing. All this was achieved through his gracious and intuitive guidance. His depth of thought and rigor is truly extraordinary. We were the recipients of his deep reservoir of business, life, and academic acumen. Our dialogues were invaluable and truly impactful. As a result, we emerged as changed men.

In a world drowning in intelligence yet thirsting for wisdom, Brian is a rare sage. He is a true gift in our lives and Doctoral journey. For this, we are eternally grateful.

Dr. Kate Maguire, Associate Professor and Head of Doctor of Professional Studies
(Transdisciplinary Practice), Middlesex University

Dr. Phil Squire, Consalia

Dr. Fred Kiel, Kelly Garramone, Nikky Heidel, and KRW Team

Tom Hayes, CEO Riley Hayes, and co-author of *Relevance: Matter More*

Dr Christine Eastman

The Summit Group Team

The Strategic Account Management Association

In Memoriam – Dr. Fred Kiel

Painfully and ironically, as we are writing the final chapter in our Doctorate journey, we were informed of the passing of Dr. Fred Kiel.

I, Phil, have been a friend, colleague, and business partner of Dr. Kiel for over 25 years. Fred has been one of the most influential people in shaping the arc and substance of my life. More importantly, he has done the same for an immeasurable number of people around the world.

Fred represents the true great Midwest and American story of academic and life achievement. Born in rural South Dakota, he always yearned for what he did not know. Against all odds, he gained a high school education and then began his undergraduate studies at Augustana College in 1959. His educational path then led him to Macalester College from 1960 – 1963, then on to The University of Minnesota for his Undergraduate degree in 1965, and culminating in his Doctorate in Philosophy, Counseling Psychology in 1971. This educational foundation launched Fred on a lifetime of extraordinary and varied experiences and accomplishments.

His crowning achievement, however, was his third book, *Return on Character*, published in 2015 by Harvard Business Review Press. It has sold over 15,000 copies and is considered to be an “evergreen” book – in that its timeless insights and wisdom consistently sell year after year without becoming “dated”.

Most importantly, Fred was wise, kind and deeply compassionate. We dedicate this work to his work and will continue in an ongoing research initiative to shape the of “Return on Character” taxonomy to the future of sales.

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Glossary

B2B

Business-to-Business describes the buying and selling relationship between two or more business organizations (Contrast with B2C).

B2C

Business-to-Consumer describes the buying and selling relationship between a business and end consumers. The B2C transactional and physical flow of goods and services might include distributors, purchasing organizations, wholesalers, and retailers (Contrast with B2B).

Co-Creation

The process, principles, and approach guiding how two or more organizations align, ideate, create, and execute a joint approach to bring new products and services to market. Analogous to 'open innovation'.

Go-to-Market

The strategy and tactics an organization employs and deploys to bring their products and services to customers and prospective customers.

KAM/SAM

Key/Strategic Account Management refers to the role of an individual responsible for leading an organization's business relationship with a key/strategic customer and/or the go-to-market strategy of an organization targeting key/strategic accounts.

Return on Character/ROC

The measurable impact of character on organizational performance as defined in Dr. Kiel's book *Return on Character – The Real Reason Leaders and Their Companies Win*.

ROI

Return on investment. A business analysis used to evaluate the benefit an organization gains from a particular activity or investment of time and funds, and to compare the relative efficiency of different investments.

Sales Framework/Process/'Operating System'

The methodology by which an organization structures and organizes their selling activities across functional roles.

SAMA

Strategic Account Management Association

An association serving the community of organizations developing and implementing a key/strategic account management go-to-market model.

Strategic/Value Selling

A sales methodology and philosophy enabling a strategic, value-focused approach to engage, contract, and execute with customers and prospective customers. 'Strategic' includes taking both a long and short term perspective, prioritizing accounts and opportunities, strategizing to engage key stakeholders, and the approach taken to protect/win/grow business with targeted accounts. 'Value' considers the selling organization's capabilities to create, communicate and deliver measurable value beyond the net price, or cost, of the product or service.

Abstract

Disruptive forces, technology, new players and dynamic shifts in how companies buy, and sell are threatening incumbent industry leaders and traditional business models. To survive and thrive in future, companies will need to transform how they go-to-market, shift mindsets, and develop new capabilities for how they sell and engage customers to co-create value.

Drawing on almost eighty years combined experience and consultancy in sales and marketing, across industries and geographies, our public works represent a body of knowledge developed through research and real-world application of our methodologies and principles. These public works illustrate the tools we have used to shape how companies engage with and sell to their customers.

This Context Statement critically explores how we have engaged with clients and applied frameworks, principles, and tools across the go-to-market continuum of relevance, strategic/value selling, co-creation, and organizational transformation. It evaluates the impact of these works on how leading companies, such as 3M, Abbott, Cisco Systems, General Mills, Medtronic, and Johnson & Johnson sell to, and engage with their customers, and outlines the ways in which these companies have transformed how they go-to-market, evolving from a transactional supplier-buyer model focused on product features and price, to co-creating differentiating value beyond-the-product both for their customers and for their customer's customers.

Two lenses are applied to interrogate and re-examine our public works:

- *Character Science*: An individual's unique combination of beliefs and character habits that motivate and shape how they relate to others. This lens builds on the research of Dr. Fred Kiel.
- *Mindsets*: Specifically, the sales mindsets that influence how salespeople think and behave. This lens draws on the work of Dr. Philip Squire.

These two lenses reveal the importance of transformational selling fluencies, behaviors and capabilities that will enable sales, business-to-business value creation, learning, and relevance in the future, in the fourth era of selling – and highlight a glaring gap in how these capabilities are developed today to enable.

- *Customer-centric organizational transformation*
- *Learning and development transformation* integrating both horizontal process/skills and vertical acumens.
- *Personal transformation* that enhances the value and well-being of sales people, increasingly threatened by the forces of technology, complexity, and commoditization in the marketplace.

Finally, this Context Statement describes the integrated Return on Character® Value Chain for Sales, a hypothesis for the *sales fluencies of the future* – the next generation of sales mindsets, skillsets and behaviors that will enable companies and sales people to continue to enhance how they go-to-market, co-create value with customers, and professionalize selling in the eras ahead.

Philip R. Styrlund & James C. Robertson

December 2022

1. Introduction

This context statement critically reflects on our public works, which are the result of our careers spanning over 40 years in sales, marketing, account management and learning and development. Drawing on the insights gained from our experience, research, and consultancy, we assess the evolution of the traditional sales function and look ahead to examine the sales fluencies that will enable organizations and people to continue growing, learning, creating value, and transforming how they do business with their customers.

Although we hail from opposite hemispheres, our work and careers display common themes, underpinned by shared values and interests and by complementary capabilities. Our collective preoccupation with developing the sales profession and account management first brought us together in a conference room in southern Sweden in January 2005. Since that time, we have collaborated with the aim of transforming the business-to-business sales model. Our goal has been to bring about a shift from an archetype that represents the features and benefits of products and services to one that enables scalable, differentiating value co-creation between companies and their customers.

Our joint values and interests, which first brought us together and which underpin our friendship, are the guiding principles behind our work and are a key part of our identity:

1. *Being interested* in people, business practices, and the world around us;
2. *Having a growth mindset* – believing we can always be better and can continue learning;
3. *Collaborating* – based on trust, collaboration enables the integration of our unique strengths and diverse perspectives to amplify the reach and impact of our activities;
4. *Believing that business is a powerful vehicle for change* for the common good of people and society.

Our curiosity quotient (Chamorrow-Premuzi, 2014) is captured in the phrase “*be interested, not interesting*” and originates from Phil’s father, who emphasized the perspective as key to a fruitful life. Being interested has fueled our consulting practice by infusing new ideas and emerging perspectives into our work. These new ideas and perspectives have shaped the insights we bring clients and the ways we coach clients to engage and create value with their customers. Einstein’s often quoted statement, “*I have no special talent. I am only passionately curious*” (2022), aptly

characterizes our own outlook. Curiosity empowers deep-thinking, generates creative solutions, and inspires more trusting and more collaborative relationships with clients and colleagues (Gino, 2018).

In addition to our guiding philosophy of *being interested*, a *growth mindset* has enabled us to cope with the challenges we have faced and to improve as a result of them (Dweck, 2014). A growth mindset stands in sharp contrast with a fixed mindset, which envisages intelligence and other abilities as inborn traits. A fixed mindset is associated with avoidance of challenges and easy discouragement when confronted with failure (Prinz, et al., 2021). Having a growth mindset and being resilient have facilitated our progress when we have faced turning points in our lives and careers.

In a world of trauma, division, conflict, and disinformation we believe companies can lead change for good, both for individuals and for entire communities. Amid increased distrust of media and government, business is now perceived as having a responsibility to take on a leadership role in solving societal problems such as climate change, discrimination, job loss and income inequality (Edelman Trust Barometer, 2022).

Our practitioner experience as sales representatives, strategic account managers, and sales leaders, our public works, and consultation with some of the world's leading company's sales organizations, provides us with a unique vantage point to analyze the progression of the sales function and to develop a hypothesis of the drivers and capabilities that will shape its future trajectory.

We contend that changes in how companies buy and how organizations sell will continue to accelerate. These changes will demand new thinking, different competencies, and distinctive capabilities. Sales success has long been driven by process, systems, and activity excellence (CSO Insights, Miller Heiman Group, 2018). While these capabilities will remain important, our hypothesis is that technology, automation, web-portals, and AI will manage the basic sales functions. In this changed sales environment, the role of the sales person will evolve to being a trusted strategist for their customers.

The future sales role will be transformed by the implementation of new solutions, thinking and business models, which will create superior value propositions and will thus result in “greater opportunities for co-creation and result in benefits (or ‘value’) being received by the buyer, and for the supplier by way of revenues, profits, referrals, etc.” (Payne, et al., 2008).

We predict that the fluencies for the future sales person will draw deeply on mindset – how salespeople think – and character science – how salespeople present themselves and are received by their customers and internal business partners. In the context of this impending transformation of the role and capabilities of sales, we seek to explore how the development of these future fluencies will require both horizontal and vertical learning.

1.1. Philip R. Styrlund

This inquiry seeks to use reflective practice and critical reflection to illuminate the beliefs, assumptions and values that underlie my career, consulting practice and my work with clients. The inquiry aims to uncover the implicit motivational drivers and preconceptions that inform my beliefs and that in turn influence how I present myself to others. This exploration of beliefs and motivations is structured around a series of salient questions that enable each layer of motivations to be uncovered in an approach that intends to elucidate first principles. This approach enables an analysis of the bedrock of beliefs that underpin how I present myself and relate to others.

The first of these questions probes what it is that I seek to project in my engagement with clients. Reflecting on this question, I am conscious of the core principles of presence, interest, and clarity, which guide my work. First, I seek to be completely present in the moment with the client. This presence enables a deep exploration of the challenges presented by the client and ensure I am able to apprehend and comprehend the multiple facets of the client’s situation. Assumptions can be damaging when they encourage a perception of similarities between the current situation with previous situations encountered. Relying on assumptions can corrode one’s attention to the complexities at play in the present moment.

My first goal is to allay the client’s anxieties by communicating my presence by their side. People are comforted not by the immediate offer of solutions but by knowing they are not alone in facing the challenge at hand. The establishment of a relationship of proximity to the client can be

understood as an attempt to move from sympathy to empathy. The movement from sympathy to empathy entails moving from feeling for a person's feelings to actually stepping into the situation with them. I thereby convey the sense of being an outside-insider in my relationship with them and their challenge.

Listening plays a significant role in this process. There is a difference between active listening and paying attention. Active listening is the ability to suspend the urge to find a solution for the problem for as long as possible in order to reveal the root cause of a given challenge. Paying attention is the ability to be attentive to what a person does not explicitly communicate, in other words, weaknesses or distortions in their perception of a situation. After establishing this posture of attention, I seek to convey the sincerity of my interest in them and their situation.

The etymology of the word "sincere" offers an insight into the attitude thus characterized by this adjective. There appear to be two theories regarding the origins of the word. In 17th-century France, sculptors used wax to adulterate the metals with which they worked. A sculpture made of unadulterated metal was said to be "without wax" – "sans cire" in French. It is thought that the English "sincere" might be a rendition of this French expression. "Sincere" was also first recorded in English in the 1530s as derived from the Latin word *sincerus*, meaning "clean, pure, sound, etc.," according to the Oxford English Dictionary (2022).

The action of immersing oneself in interest for another can have transformational impact. When people sense this abandonment-of-self oriented towards them and their problems, they open up and reveal themselves in transformative ways. Clients are thus able to abandon their self-consciousness and to articulate their knowledge of the situation in full. My questions elicit a maieutic effect, whereby the client's latent ideas about the situation are brought into the open.

My highest aspiration in client engagement is to provide wise counsel. My interactions are informed by career of design thinking and listening principles that enable me to bring clarity to complexity. This sense of clarity acts as an antidote to clients' anxieties. My practice draws on principles rather than tactics. Tactics are inherently transitory and unstable in nature, whereas principles are durable. The value of principles is that they are portable and can be transferred over to multiple situations.

The second of these questions that enables me to explore how I relate to clients is that of why it is important for me to project myself in this manner. My curiosity in the human condition is the first factor that explains why I present myself to clients in this way. My desire to matter and be relevant is the second factor. My innermost desire to please others is the third and final factor.

My curiosity in the human condition has been constant throughout my life. My interest in the origins, meaning and future of the human condition constitutes my worldview and motivates my interest in the fundamental questions faced by humanity. As I age, my openness to these fundamental questions is coupled with an increasing lack of concern for being needing to be right.

In *The Lessons of History*, Will and Ariel Durant distinguish the three core drivers of human behavior based on their analysis of 3,211 years of human history (Durant & Durant, 2010). They conclude that the motivational forces that govern human nature have not changed over that time, rather that they have simply been subject to rearrangement and acceleration. The first motivational force uncovered by Will and Ariel Durant is individuals' paramount need to be valued. The second is the role of self-interest in dictating human action. The third is people's desire for order over chaos. The enduring nature of these first principles make them an invaluable tool in engaging with people and clients around the world.

My deep desire to be relevant and to achieve an impact on the situations I face has been shaped by my insecurities. The insecurity of this ongoing need for reassurance that my actions have a value has, oddly, benefitted my work by driving me to serve others. The fundamental truth is that my drive to serve others is motivated more by selfish interest than selflessness. In essence, my dependable flaws animate my dependable strengths. The positive aspect to my weaknesses is their dependability. Ultimately, I have derived immense benefit from repurposing these weaknesses. Moreover, my desire to please others is the result of this dependable weakness, and deep reflection on my psychology reveals that its origins lie in the belief that I am inadequate.

The third question that enables a deeper analysis of my interaction with clients relates to my beliefs and the ways in which they influence my actions. Interrogating myself on the nature of these beliefs, I conclude that my foremost conviction is that I am here for a defined purpose. I perceive this purpose as a kind of sealed order, innately hardwired in me, that calls on me to have a positive

impact on the lives of others. I evaluate my life based on the impact I have on others. My design principle is to focus on intimacy rather than on scale. This principle is the fruit of my realization of the profound impact of a small set of people on my life. My signature strengths, combined with my flaws and with the non-random relational influences, form a covenant with my Creator. This calling to have a positive impact has led me to a vocation and business that have enabled me to fulfil my purpose.

I have always been guided by the wisdom encapsulated in the maxims of two thinkers. The first is John Wesley's dictum, *"Do all the good you can, by all the means you can, in all the ways you can, in all the places you can, at all the times you can, to all the people you can. As long as ever you can."* (1999, p. 51). The second is Ralph Waldo Emerson's assertion, *"To know even one life has breathed easier because you have lived, this is to have succeeded"* (2014, p. 39).

My confidence in these principles is sustained by the observation that our team is doing some of our best work right now. The success of this work reinforces my support for Dorothy Sayers's thesis in *"Why Work?"* (2014). Doing good and doing the right work matters more than ever now. Work is essential in keeping people engaged and whole during these untethered times. Work provides meaning and purpose when these are needed most.

A central source of insecurity when I was growing up was the belief that my value and standing in life were performance-based. I mistakenly viewed myself as a human-doing more than a human-being. On reflection, some of this mindset may have been the result of my Scandinavian upbringing which combined a strong belief in work ethic combined with a Lutheran upbringing that focused on a life of humility.

My grandparents emigrated from Norway and Sweden to Minnesota, where my parents met, married, and created our family. I believe my grandparents brought with them an internalized social taxonomy that were likely shaped by the Ten Laws of Jante (Sandemose, 1936), which were often on the walls of the schools in these countries. I did not discover this ideological framework until later in life, yet it appeared to codify much of the Scandinavian mindset in which I was raised.

The Laws of Jante;

1. *Don't think you are anything special.*
2. *Don't think you are as good as we are.*
3. *Don't think you are smarter than we are.*
4. *Don't convince yourself that you are better than we are.*
5. *Don't think you know more than we do.*
6. *Don't think you are more important than we are.*
7. *Don't think you are good at anything.*
8. *Don't laugh at us.*
9. *Don't think anyone cares about you.*
10. *Don't think you can teach us anything.*

The Laws of Jante originated in a work of fiction by the Norwegian writer Axel Sandemose. In *A Fugitive Crosses His Tracks*, (1936), Sandemose writes about the Danish town called Jante and the unwritten social code that defines it. This novel depicts the author's alter ego, Espen, a sailor who sets about discovering himself through his childhood in a town. A deeper reading reveals that Sandemose's novel actually documents an implicit social code found across Denmark and Norway and to an extent Sweden. Sandemose's thesis is that across Scandinavia this peculiar set of laws or rules exists. These laws are not made explicit, but they are nevertheless tacitly enforced by everybody in unison. Janteloven are not that different from the cultural codes that exist in other countries and that exist to promote peace and a sense of common values in collective society. The reputed Scandinavian desire for equality and distaste for class divides is embodied in this code, which makes the world seem a fairer place where all is equally divided. During my upbringing, my Father always reminded me what we are free to do anything as long as we do not appear different or stand out. The unspoken norm was to be moderate to avoid drawing attention to oneself.

The sources of my personal insecurity can thus be traced to a confluence of nature and nurture. Nature explains the fact that I was born with a genetic predisposition to anxiety. Nurture accounts for the role of my childhood years, which were grounded in the principles of Janteloven and the tenets of Lutheranism. The challenge is to not let humility reap mediocrity. These tensions played out in my teenage years, when I begin to experience an insatiable spiritual and intellectual curiosity. I was driven to discover and to define the best way of living my life. I was thus impelled to gain new knowledge, experiences, and perspectives. I was obliged to differentiate myself – to stand out –

from where I had stood in the past. I saw more and wanted more from life. I began to redefine the quality and substance of a life well lived.

My conception of the good life well lived is informed by three compelling definitions. The first comes from the teachings of Jesus, where he expresses the four core components of life: heart, soul, mind, and strength. The second is articulated concisely by a wise friend Larry Wilson, founder of Wilson Learning. Larry asserted that a successful life is *“going as far as you can, given the resources you’ve been given, towards the purpose you’ve defined”* (1996, p. 141). The third is a more comprehensive framework, which I discovered in a book I read in my early thirties entitled *The Pleasures of Life* by Sir John Lubbock (1887). The chapters of the book provide an extraordinary framework and taxonomy of a fully experienced life. The chapters are: The Duty of Happiness; The Happiness of Duty; The Choice of Books; The Blessing of Friends; The Value of Time; The Pleasures of Travel; The Pleasures of Home; Education; Ambition; Wealth; Health; Love; Art; Poetry; Music; The Beauties of Nature; The Troubles of Life; Labor and Rest; Faith and Religion; Hope; Destiny. These chapter titles delineated a vast tapestry of aspirations for my life. I was never preoccupied with perfection. I was satisfied with simple progress of daily self-improvement and of the journey to being a more fully-formed person.

This concept of being more fully formed has always intrigued me. The idea is elucidated by Carl Rogers, who describes life in terms of principles rather than stages of development (1959). These principles exist in fluid processes rather than static states. Rogers argues that fully functioning individuals continually aim to fulfil their potential in each of these processes and thereby achieve what the scholar calls “the good life.” Individuals who fulfil their potential in the course of the processes achieve an accretion of personality and self-concept, which emanate from experience. Rogers finds that fully functioning individuals have several traits, or tendencies, in common:

1. *A growing openness to experience* – they move away from defensiveness.
2. *An increasingly existential lifestyle* – living each moment fully, rather than distorting the moment to fit personality or self-concept.
3. *Increasing organismic trust* – they trust their own judgment and their ability to choose behavior that is appropriate for each moment.

4. *Freedom of choice* – they are not restricted by incongruence and are able to make a wide range of choices more confidently. They believe that they play a role in determining their own behavior and so feel responsible for that behavior.
5. *Higher levels of creativity* – they are more creative in the way they adapt to their circumstances without feeling an obligation to conform.
6. *Reliability and constructiveness* – they can be trusted to act constructively. Even aggressive needs will be matched and balanced by intrinsic goodness in congruent individuals.
7. *A rich full life* – they experience joy and pain, love and heartbreak, and fear and courage more intensely.

Rogers' framework is predicated on the notion that the difference between individuals is so large that they can disagree on fundamental things such as the definition of good and bad. From these differences, we develop different behaviors, which create our personalities. Rogers concludes that the cognizance of these different perceptions "leads to self-concept, our perception of ourselves. Inside self-concept there is the ideal self, flawless characteristics we believe that we possess. The ideal self is the way we think about ourselves in a conceptual way, without being affected by the environment. For example: 'I am smart,' 'I am brave' or 'I am a quiet person.' The ideal self is usually pure and flawless. In contrast with the ideal self, there is the actual self, the way one acts in real life. A person is aware of both of these two selves" (1959, p. 184-185).

This difference between selves leads us to self-actualization, the tendency to enhance ourselves and fulfil our potential. The ideal self is the way we view ourselves at the height of realized potential, and we thus aspire to achieve that potential and realize that version of the self. Therefore, self-actualization is the process of making the actual self more akin to the ideal self. If we achieve this development, we gain self-esteem and a sense of self-worth. Carl Rogers argues that self-esteem is the goal of our life and self-actualization is what dictates our actions. The desire to achieve self-esteem and to feel a sense of value is underpinned by the standards of value and worth set by other people. The expectations of others, if unachieved, can lead us to use excuses or to encounter anxiety and depression.

A salient moment from my adolescence is etched in my memory. I was twelve or thirteen years old when my mother said to me in a wise and loving manner, "*in life you may find that your mind will*

take you places your emotions can't handle." Knowing me more profoundly than anyone else, she had a discerning insight into my genetic make-up and disposition. She went on to remark that I have been blessed with a strong mind and with a highly sensitive emotional system that feels things deeply. Aware of the genetic pre-disposition hard-wired within me, she counseled me to go as far in life as I choose.

Given my genetic predisposition, I have dealt with episodes of depression and anxiety. I reflect on her wisdom and clarity, which have been some of the greatest gifts in my life. Her maternal intuition provided me with an unparalleled insight into my own self and provided me with precious guidance. This guidance has not always enabled me to avoid the emotional adversities of life, and yet it has helped me to understand and accept the realities of my mental architecture. My mother's guidance allowed me to accept my gifts and challenges as unrequested encoding. Once I accepted my genetic realities, I have been able to rename and re-purpose them as accretive attributes. Anxiety is now simply my form of scanning. Depression is now my form of humility insurance. Worry is now my form of preparation. These dependable challenges have been part of what has allowed me to find success, fulfillment and significance in my life and work.

An additional insight granted to me by this experience in my realization that the more we seek to mature, the more difficult it is to fulfill a condition of worth. We are expected to project and to achieve more things: greater financial security; better time management; to achieve an appearance of success. As we mature, there are ever more standards for us than we can possibly hope to fulfil. And yet these expectations are ever more exacting; moreover, they are exacerbated by our tendency to compare ourselves with others who seem to have achieved all that we have not. Thus, we are subjected to tremendous pressure to be something we cannot. When we are adults, we can no longer make excuses because we are directly affected by the consequences. This fear of failing to achieve the ideal self can lead to anxiety and depression.

My personal acquaintance with such feelings has often motivated me to respond by working harder. But this response has invariably aggravated the problem, and so part of my work has been to reconceptualize and upgrade my definition of what it means to live a full life. This reconceptualization involves shifting from a focus on success to significance. David Brooks describes this transition as the development of eulogy virtues instead of resume virtues. Such a

transition implies taking the seven descriptors of *The Good Life* (Brooks, 2019) and reorienting them to a life of self-donation towards a goal of creating something that outlives me.

This project of creating a legacy beyond the parameters of one's natural lifespan is encapsulated in my aim of achieving a profound impact on a small number of people. The impact can be realized by supporting, mentoring, and coaching these people who cross my path in life and reaching out in an honest desire for friendship. I seek to support others in the spirit not of preaching to them but rather accompanying them as an equal. Instead of setting out to solve their problems, I seek to listen. I have discovered that the greatest impact is achieved through the radical transparency of sharing my deepest mistakes and vulnerability, thereby assuring others that they are not alone. The joy I derive from mentoring younger people has become the central joy of my life. This process of introspection has enabled me to discover how different genetic and biographical factors have prepared me for the satisfaction I derive from imparting the fruits of my experience to others.

1.2. James C. Robertson

Derald Wing Sue (1978) defines worldview as a person's perception of his or her relationship with the world. My worldview is grounded in my values, which emphasize the importance of family, learning, innovation, creativity, and the business of sales. These values were shaped by my parents and by my career in sales and marketing, in which I have lived and worked in different parts of the world and encountered significant people, who have played a salient role in molding these values.

Farah A. Ibrahim and Harris Kahn develop a scale to assess worldview and to categorize the different sets of beliefs, values and assumptions that make up a given worldview (2015). According to this scale, my values, thinking and behaviors can be characterized as optimistic. An optimistic worldview is typified by a belief that human nature is essentially good, by activity focused on both spiritual and material development and by a future-focused orientation. This set of characteristics undoubtedly reflects my ideal values as propagated by the culture in which I have been born and raised. Nevertheless, I am tempted to question whether they are the values I actually live by.

My family's nomadic history and my personal experience of living and working in seven countries on four continents have strongly influenced my values, my self-presentation in the world and the ways I interact with people and clients. These experiences have amplified the importance of family.

Attachment theory (Bowlby, 1969, 1982) suggests that relationships are an integral part of human life and that a strong emotional bond ties individuals in such relationships together. In my own case, distance has, paradoxically, brought our family unit closer. No matter where in the world we live, we have ritualized our family gatherings and have met at least once a year over the past forty years.

An additional effect of my multicultural upbringing, significant travel, and global career is my ability to build rapport fast and interact fluently with individuals across countries and cultures. Employing the strategies of self-disclosure, common ground, and affirmation (Dianiska, et al., 2021), I am able to build trust, engage and collaborate effectively with people from diverse backgrounds. My intercultural fluency is built on appreciation and respect for each person's identity and culture and explains why I have gravitated towards leading global client relationships with multinational companies including Unilever, PepsiCo, Johnson & Johnson, Medtronic, and Abbott, and why I have spent a large portion of my career working with, and leading, global, multicultural teams.

The negative side to this transient life is the attendant obstacles it has placed on my ability to cultivate deeper relationships. As an 'expert generalist', I have gained experience in a variety of different areas, and, at the same time, I have been unable to develop profound expertise in a single area. As a result, I have many superficial contacts and a substantial LinkedIn network yet only a few consequential affiliations.

The roots of my passion for learning lie in the environment in which I was raised. My parents valued education and made personal sacrifices for my own success. Furthermore, my experiences growing up amid the turmoil of apartheid-era South Africa imbued in me a strong sense of the importance of learning. To my mind, learning represented a way of empowering people with the freedom to change and to live and work where they choose. Nelson Mandela observed the potential of education to equip people with the means not to be a victim of their circumstances: *"Education is the most powerful weapon which you can use to change the world"* (Mandela, 1990).

Growing up in apartheid South Africa has caused me to ask myself the question: *“Am I a good learner?”*. If learning is defined as *“making sense of and acting upon the personal, social, occupational and political environment in which a person lives”* (Brookfield, 1986, p. vii), I failed to be curious, to elevate awareness, and fully comprehend the impact and injustices of apartheid. This experience recently reoccurred with the realization, triggered by the murder of George Floyd (Wikipedia.org, 2020), that I was unaware of, nor acted upon, the deep racial inequity in my adopted home town, Minneapolis. I contrast my experience and learning with the action taken and insights offered by Dr. Ian Robertson, whom I communicated with during the ensuing unrest and protests¹. The Harvard Crimson commented that the *“last remnants of individual liberty are beginning to disappear in South Africa”* when Ian Robertson, 21, then president of the National Union of South African Students (NUSAS), was banned following his invitation to Senator Robert F. Kennedy to come to South Africa and speak at a NUSAS conference (The Harvard Crimson, 1966). Robertson’s invitation led to Kennedy’s *“Ripples of Hope”* speech (Charton, 2022), and had a substantive impact to advance civil rights in America and around the world (RFK in the Land of Apartheid, 2009). Robertson’s story, amplified by parallels in our name, lived experiences and education (We both attended the same preparatory school and university in Durban, South Africa), prompts me to reflect on why and how we learned, acted, and responded in such different ways to common circumstances. Possibly the answer lies in Dr. Robertson’s words written the year I graduated from high school: *“Only when the real and imagined risks of the alternative society are gradually demolished in the perception of non-Africans in the country, can their greater susceptibility for, and resistance to, change be expected”* (1978, p. 51).

My parents were naturally curious and exposed me, through travel and the way they interacted with people, to the rewards of being interested. I observed how people from all walks of life positively responded to my parents’ authentic curiosity. I thus experienced the anticipation and excitement

¹ **Message from Dr. Ian Robertson, February 2, 2021:** Hi James, I hope you are well and I'm sorry not to get back to you earlier. Yes, the USA is a very different country than the one I was drawn to in the 1960s when, however imperfect, it was the fount of idealism for the world. Frankly I think that identity politics is the underlying problem, even though some promote it as a solution. When people think of themselves primarily in terms of their racial differences, instead of their common humanity, you have the essential precondition for conflict. Martin Luther King and Nelson Mandela understood this and argued for a color-blind society -- a highly politically incorrect position now! Unfortunately, the democrats are becoming the party of identity groups demanding redress, and the republicans the party of white people resisting those demands. So, there is an increasingly nasty division that is making the USA barely recognizable to me. I think it will take a new generation to sort all this out. My generation has been running things for far too long. Stay safe -- Ian

that stemmed from exploring and interacting with diverse cultures and from living in new places. For example, while visiting a Chesapeake Bay crab-shack, my father went missing, only to be found sitting on a wire basket behind the establishment, talking to the local crab fishermen who were immersed in conversation with him as they shared their craft with a man they had never met.

The key theme in my Public Works of innovating the business of sales, marketing, and account management can be traced directly to my father's influence. Ian Robertson started his career in the early 1950s as a sales representative for Unilever. His role was to sell soap in southern Africa. A story of two salesmen who were assigned to sell soap in Africa, adapted from a Bata shoes story (Burnett, 2022), captures the essence of my father's mindset, innovation, and tenacity. Asked by head office to report back on market potential, one salesperson reported: *"No one uses soap here, there is no market"*, while the other sent a message: *"No one uses soap here, there is huge potential!"*. My father's intuition and his ability to innovate in sales, marketing and account management led to a global career with Unilever that in many respects mirrors my own. The fact that Unilever is recognized as a leader in rural, grass roots marketing in emerging markets (Mahajan, 2016) is evidence of his legacy. The company enjoys twice the market share in beauty and personal care of its nearest competitor in South Africa (Statista, 2017), and the use of soap and brands like Lifebuoy, Omo and Lux has become entwined in the fabric and culture of southern African countries (Burke, 1996).

Coincidentally, during my early career in advertising and marketing, I managed the Unilever account in South Africa and was responsible for creating and deploying promotions for the same brands. Aligned with the strategies my father had initiated decades before, I led development and activation of rural promotion campaigns for Unilever in the early to mid-1980s.



Figure 1: Unilever rural consumer marketing campaigns, South Africa, circa 1985 (Robertson)

Subsequently as a Global Director – Key Accounts, I managed Tetra Pak’s global business with Unilever across twenty-five countries. I was responsible for increasing sales, strengthening relationships, and devising strategies for the company’s growth with top customers, which included the largest food and beverage companies in the world such as Unilever, Coca-Cola, PepsiCo, Danone and Nestle (Food Engineering, 2021).



Figure 2: Tetra Pak - Unilever Strategic Plan, 2007 (Robertson)

My front-line sales, marketing, and account management roles, combined with my interest in innovating how companies engaged with their key customers, led to organization-wide initiatives to listen to, measure and act on the voice of the customer. I was responsible for Tetra Pak’s Customer Satisfaction program (Kashani, 2002) and for establishing and deploying the Company’s Key Account Management (KAM) strategy and capabilities initiative in 2004. As part of this KAM initiative, and following a rigorous search, Tetra Pak selected The Summit Group (TSG) as partner to train and develop their sales people globally in the art and science of customer-centric key account management. It was during this process I first met Phil Styrlund.

Leading a twelve-person global network dedicated to internal consulting, training, and coaching, we implemented – in collaboration with TSG – a key account management (KAM) and value selling approach with over 200 customer teams representing \$6.2 billion in sales in 48 countries. This KAM initiative achieved substantial impacts by:

1. Contributing to a 116% increase in company growth rate and doubled the number of satisfied customers to exceed a world-class industry benchmark, with 82% of customers being “Truly Loyal”. This expansion of growth and loyalty was accomplished by securing organization-wide customer focus, by garnering executive support, by establishing cross-function customer teams,

by installing a value-based selling mindset and skillset and by integrating the “voice of the customer” into strategic planning and execution.

2. Leading to the development, design and company-wide implementation of Customer Relationship Management and Opportunity Management business processes.
3. Redesigned the Customer Satisfaction program to integrate customer loyalty, competitive benchmarking, global customer, and event-based surveys while significantly reducing costs through a web-based platform.
4. Establishing a Customer Intelligence function to track and report customer feedback insights as a key input to corporate and customer strategic planning.
5. Establishing a training academy with responsibility for design and delivery of training programs on Key Customer Management, Sales and Leadership targeting over 1000 cross-function team members and 200 account leaders.

The sales and account management practices set in motion at Tetra Pak were pioneering in their implementation of new strategies by which companies could collaborate to elevate their customers’ value proposition and grow their mutual business. Philip Kotler distinguishes between *market-driven* and *market-driving* companies and recognizes Tetra Pak as exhibiting a *market-driving* orientation (2012). Kamran Kashani observes that the Company’s Key Account Management program “was launched to bring closer alignment between Tetra Pak’s practices and important customer’s business and marketing strategies” and highlights the rewards reaped by the program: “Tetra Pak’s customer alignment initiatives have paid back handsomely” (2005, p. 84).

Fortuitous circumstances led me to join The Summit Group in 2008. As a result, I have had the privilege to enhance my collaboration with Phil to advance the practice and profession of sales, marketing, and account management.

1.3. Heritage and selection of public works

This synthesis, critique and reflection on our public works focuses on past and current go-to-market strategies and practices of business organizations. The analysis provided enables us to look forward to critically assess the relevance of these public works and strategies for their effective application in future.

One of the outcomes of this analysis is a pragmatic go-to-market strategic selling / account management framework [“operating system”], which comprises principles, tools and fluencies guiding companies and people to:

- Engage and ensure ongoing relevance while creating differentiating value with their business customers in the future.
- Build, embed and sustain best-in-class strategic selling competencies and capabilities into their culture and way-of-working to continue to create value for customers and profitable growth for their company.
- Collaborate to co-create value *with* customers.

The importance of creation of customer value and profitable future growth for companies is captured in the voices of more than 1,300 global CEOs and organization leaders from 77 countries (PWC, 2015). As these business leaders grapple with the key implications of their companies’ fast-changing, competitive landscape, they are obliged to:

- Create new value in new ways;
- Develop diverse and dynamic partnerships; and,
- Find different ways of thinking and working.

Our collective perspective on the new context of strategic selling and account management is captured in these seven trends:

1. **Customers want to deal with business people not salespeople.** In a sense, sales training has been teaching the opposite of what customers seek. Sales is now about listening, thinking, solving and structured storytelling. Based on our consulting practice and decades of client engagement, what customers seek most are relevant insights from other business contexts.
2. **We are now in a post persuasion world.** For the past 100 years, the science of selling has been based on the art of persuasion, on the assumption that the supplier has more information than the buyer (Pink, 2016). This situation has now changed radically. Customers now usually know more than suppliers, which means that selling is now about alignment. Aligning one’s capabilities with customer concerns offers a way of elevating and accelerating their business model and value proposition to their customers.

3. **Everything is becoming commoditized.** Regardless of the products or services one possesses, they will rapidly become commoditized. A Bain study shows that 80% of suppliers feel they provide customers with a superior value proposition. When they ask their customers, the customers indicate that only 8% are truly distinctive (Bain & Company, 2005). Value is created and determined by the customer. Distinctive value is now created as much by how one engages with one's customer as by what one sells. Additionally, most markets are now in a state of permanent disruption. Industry verticals are finding that the cycles of disruption are accelerating (McKinsey & Co., 2019). As this situation shifts, agility will matter as much as ability. Speed is the new scale.
4. **How customers buy has changed.** B2B buying decisions are no longer taken and influenced just in the C-suite, nor are they driven solely by individual stakeholders. Recent research indicates an average of 6 – 10 decision-makers are involved in major buy decisions in a business-to-business context (Gartner, Inc., 2019). The number of individuals involved in the decision-making process means that salespeople are now selling into systems not individuals. They are thus competing for customer mindshare in an omnichannel, digital, generative AI, increasingly commoditized world (McKinsey & Co., 2021).
5. **The end of loyalty.** Loyal customers do not always translate into committed customers. Research indicates that true long-term commitment is based on the customer's belief in one's future stream of insights (Helsing, 2003). Customers are purchasing your future perspective. This insight selling adds layers of value to fortify the value of one's solutions.
6. **Status quo thinking is the new competition.** Often the largest barrier to selling is the customer's belief that their current state is safe (Dixon & McKenna, 2022). The key is to provide a disruptive perspective showing how others in their space are changing the game. This disruptive dialogue requires a heightened level of business acumen.
7. **The easy growth is over.** The challenge for many companies is profitable growth (Accenture, 2021). The key is to imbue one's salesforce with a deep understanding of what constitutes good business. A deeper pursuit with fewer successes is more important than numerous superficial successes. There has been a shift from the era of demand capture to demand creation. Customers seek suppliers who have a direct positive impact on their value proposition to distinguish how they serve their customers. To create and deliver this level of fortifying value, sales and marketing integration is essential. The key is to create a "marketing-led, sales-driven" company (Sirsi, 2005). Understanding what the customer seeks is central to this process.

Companies that view the market from the outside-in are more successful (Strategic Account Management Association, 2014). The inside-out perspective accelerates commoditization by creating a perspective focused blindly on products. True integration is when sales people are thinking like marketing and marketing is thinking like sales.

These forces converge around a core opportunity, and a new perspective on an optimal sales engagement and coverage model is needed. The key is to align omnichannel sales engagement with how the customer seeks to buy at each stage in their buying journey. This alignment can elevate the business relevance of the sales force and create an engine of real-time relevance. It offers the ability to have authentic, insight-driven, distinctive, bespoke, and concise conversations during each interaction with customers.

For us, these trends, together with character science and sales mindset, present an opportunity to reflect critically on our public works, to shape our business and to energize our capabilities and practices. We are thus able to be relevant and impactful for clients in the future, to grow personally, and to sustain our business.

We apply the lenses of character and mindsets to re-examine three clusters of our Public Works, that reflect a passage, or continuum, through the theory, thinking and practice of business-to-business selling, account management, relevance, and business value co-creation:

- *Relevance: Matter More* (Book and TEDx talk), and our trademarked principles and tools, articulate the role, composition of, and framework for what creates relevance in business, sales, and life. An essential, yet often missing ingredient, relevance is determined by how the world sees who we are and how we matter to others. In a world where we are drowning in information but starving for wisdom, relevance is not a matter of what we know; it is a matter of how what we know matters to someone else. Relevance trumps intelligence in sales and account management. Customer do not care what degree you have or where you went to school. They care about the impact a sales person, or organization, can have on achieving the goals and outcomes they seek (Hayes & Styrlund, 2014).
- *Strategic/Value Selling and Account Management* – guides companies to learn, develop and execute an integrated roadmap enabling organization-wide strategic selling/key account management transformation. These public works represent a summation of our personal experience leading sales/account management organizations and captures the insights and

lessons learned via our consulting engagements with leading Fortune 500 companies (Strategic Account Management Association, 2018). This body of Public Works includes *SAMA SAM Certification Curricula and Programs* – comprehensive sales learning journeys enabling strategic account managers and strategic sales professionals to develop best-in-class customer business development & relationship management competencies. These public works include the innovative design of blended learning curricula, and the content required to deliver learning and develop SAMA certified account management capabilities (2022).

- *Business Value Co-Creation: Creating Joint Solutions with Strategic Customers* (Book and journal articles) provides a comprehensive summary of leading practices and evidence-based tools defining how companies collaborate to co-create value (Styrlund & Robertson, 2018). Our analysis leverages benchmarking data, and real-world application with world-class companies to address the components of an efficient and effective value creation process. The theme, of value co-creation is explored in a number of our public works and has shaped go-to-market strategy of prominent companies including 3M, Abbott, Cisco Systems, GSK, Johnson & Johnson, Medtronic, P&G, and Xerox (Styrlund & Robertson, 2019).

2. Lenses of Interrogation

Our research and engagement with leading client organizations reveal a fundamental, ongoing shift – driven by increasing complexity, advances in technology, and deeper insights into human behavior – in the role and function of sales from representing products to co-creating ecosystem value.

This transformation in the role of sales will demand new organizational and human capabilities beyond the traditional, linear, mechanistic learning, development, and measurement instruments predominantly in practice today.

Our belief is that while skill-based sales competencies and horizontal development will remain important, organizations must as well, invest in vertical development (Center for Creative Leadership, 2021) (Petrie, 2022), enabling salespeople and selling organizations to, for example:

- Orchestrate a network of relationships and interactions enabling the customer's buying journey and decision process;
- Be seen as trusted strategists – demonstrating the character, competence, and customer-orientation together with business model insights and strategic thinking.
- Lead, facilitate and collaborate in virtual, global, cross-organization teams;
- Elevate agility to navigate, adapt and co-create in complex or chaotic systems that demand emergent and novel practices, where there is no relation between cause and effect – to address real-world problems and opportunities (Snowden & Boone, 2007).

Many sales people and sales organizations who have, as Montuori suggests, “relied on the absolute predictability of nature to ply their trade” will be challenged as they face more complex and chaotic systems where the “reliability of the clockwork universe gives way to the prospect of a world without order” (2015, p. 12-13).

Considering this complex, networked environment we envision that understanding who you are (character) and how you think (mindsets) will be crucial to shaping the fluencies and vertical capabilities of the sales person of the future.

Given our heightened awareness of the critical role of vertical development in the future of sales, we recognized the imperative to delve more deeply into this domain. In doing so we chose to focus on the central thoughts and thinkers that animated our context statement and doctoral journey. This has caused us to more fully realize that our practice of developing strategic sales professionals needs to go beyond developing content, principles, and processes, and now focus greater depth of individual knowledge and work on how salespeople show up in the world. Our new engagement with a panorama of models, focused on constructive developmental theory and ego development, provide the provenance and insights to guide the way we will lead and activate client consulting initiatives through the integration of both horizontal and vertical development strategies.

First, will be to take a deeper look to compare and contrast the thinking of Robert Kegan, William Torbert, and the work of Susanne Cook-Greuter. The second distinction will focus on how these schools of thought represent perspectives that, both in the business and academic arenas, are not often fully presented as truly complementary perspectives. The final distinction will be a deeper perspective regarding how this understanding can further elevate and animate our work both in the world of business and academia.

As we began a deeper look at the work of Kegan, Torbert and Cook-Greuter, it codified a central truth; we construct our realities through our experiential engagement with it. Kegan approaches this topic from a psychological perspective based on cognitive theory. In contrast, Torbert and Cook-Greuter look at how people behave through the lens of action logics (2004). At the risk of oversimplification, Kegan's orders of mental complexity focus on the head (1982), Torbert is preoccupied on the person via their thinking, doing, and being. Both are attacking the same issue from different perspectives and different levels of understanding.

The core passion that we have for our work revolves around the reality that as adults continue to develop, that development shows up not just in how they think, yet more importantly in what they do and how they impact others through their behaviors. Vertical development is not solely focused on thinking, it describes how people make meaning of their world and interact with other people with varying degrees of cognitive and emotional sophistication by challenging their thinking with higher order questions to think and act in a different way.

For Kegan the transition between levels of mental complexity is grounded upon the interplay between subject and object. We transition when we are able to place as objects for challenge, things that had previously been subject. Kegan asserts that the subject/object distinction is central to development. Therefore, it is all in the head and can be worked on in a therapeutic fashion disconnected from the world (Love & Guthrie, 1999).

Kegan indicates “transformations are the way we make meaning; changes in our natural epistemologies; changes in what we are ‘subject to’, and what we can take as ‘object’. It has to do with what people can see and what they can’t yet see; the thoughts and feelings we have and the thoughts and feelings that ‘have us’; what agenda we are driving and what agenda is driving us” (2009, p. 15).

Diving deeper into the work of Robert Kegan we found threads that led back to the cognitive development theories of Piaget, whose constructivist approach, in turn, traces back to Kantian philosophy. Piaget credits Kant with the first description of an epistemological subject in the description of structures by which the subject generates knowledge (Piaget, 1952). According to Piaget, one's actions are constrained by the objects in which one operates (Eriksen, 2006).

Kegan's perspective, as articulated in *The Evolving Self* (1983), primarily addresses the growth of the mind. It focuses on the mind yet does not identify the unifying drive to make sense of the experience by constructing a coherent contextual story around it. Ultimately, adult development occurs through the interplay between person, their ideas and social and cultural environment. This development can be encouraged and facilitated, yet not guaranteed, for in the later stages lies the reality of unique self-expression (1983). We observe the obvious yet often forgotten reality, that all these adult development stages are idealized descriptions in which no human being fits entirely.

Contrasting Kegan's constructive-developmental theory with an objectivist view, the facts are what they are, and the truth of belief is strictly testable by the reference to them (Thomas, 2010). All meaningful disagreements are resolved by reference to the facts of the situation and professional knowledge rests on the foundation of those facts (Bachkirova, 2009). Professional competency is viewed as a technical expertise in which skilled professionals have higher level accuracy of the objects and techniques and the ability for manipulating them to achieve their professional goals.

The objectivist position diverges from the constructionist view (Thomas, 2010). Here the practitioner is seen as constructing the situation of practice and encompasses the way people frame and shape their worlds. Constructive activity gives coherence to indeterminate situations allowing people to test their frames of knowledge through webs of moves, consequences, and implications.

In his book, *Educating the Reflective Practitioner*, Donald Schön (1983) references the concept of constructionism, frames, and differing perspectives. He expands more comprehensively on these concepts and infuses the term “worldmaking”. The term particularly surfaces when Schön writes of constructionism and asserts “according to the constructionist perspective, our perceptions, appreciations, and convictions are deeply grounded in self-created worlds which we eventually acknowledge as reality” (1984 p. 134). These “communities of practitioners” are perpetually involved in what Nelson Goodman (Goodman, 1978, p. 19) described as “worldmaking” (Kinsella, 2006, p. 283).

As we looked more deeply into constructive developmental theory, we came to see that it describes human potential as an unfolding of understanding and effectiveness as occurring through a logical sequence of stages from birth to adulthood (Kegan, et al., 2016). Visually it is often depicted as an ever widening spiral or inverted cornucopia. It depicts worldviews evolving from simple to complex, with later stages being reached only by journeying through early orders of consciousness. It assumes that once a stage has been traversed it then becomes part of the individual’s response pattern even when more complex later stages are adopted. In essence constructive developmental theory asserts that each later stage includes and then transcends the previous one. Consequently, the earlier perspectives of our experiential life become embedded in our current experience and knowledge. Each stage then becomes more differentiated, flexible, integral, and capable of functioning in a rapidly changing, complex world. Ideally as adult human development unfolds autonomy, freedom and tolerance for difference and ambiguity increases while defenses decrease. A later-stage person can understand earlier worldviews but a person in an earlier stage struggles to understand the latter (Cook-Greuter, 2013).

Further in this inquiry, Cook-Greuter brings a perspective that addresses the whole person and offers a framework that places individuals in a larger context of greater awareness and integration

about both the inner and outer world. We see her perspective as a comprehensive view that consciously looks at the whole person whereas much research in the area of developmental theory looks at segments of cognitive development and reasoning complexity. She observes that when research gets atomized in order to create more narrow definitions that can be measured, it can often lose attention to the abstract nature of the human condition (2013).

Of unique interest was Cook-Greuter's integral model relating to meaning-making. She articulates first the operative component that looks at what adults see as the purpose of life, what they need to act upon, and what they are moving towards. The affective component looks to the emotions and the experience of being in this world in the present. The final cognitive component relates to how a person thinks and reasons about him or herself in the world. Her work along with that of Torbert, reminds us to understand that each stage emerges from the integration of doing, being, and thinking (2013).

Cook-Greuter draws upon the work of Angyal to point out that humans are in a constant dynamic tension between the pull of integration and differentiation (2004). For us this is a primary difference between her focus on ego development and Kegan's psychological focus on levels of cognitive complexity. Cook-Greuter goes on to identify transition stages where the primary focus is differentiation and separation (2013).

In our practice of sales development, this calls to the need for salespeople to work in partnership across industries to solve problems collaboratively. Additionally, this requires sales professionals to identify new tribes to integrate with while also differentiating and separating in other ways. This fits directly into our definition of the future fluency of "leading value networks" (See Figure 18).

These perspectives combine to drive a greater sense of clarity in our work as a result of this doctoral journey as they tie together the interrelationship of consciousness, behavior and action that develop a higher level of meaning-making which is essential in today's business and social climate. We see each day in our work a malaise of meaninglessness. People are deeply seeking purpose in their work and in their personal lives. Adult mental development is about thinking, doing, and being and this work elevates and structures our consultancy interventions with clients in a manner that weaves together cohesive strands of both vertical and linear learning.

We seek to meet people in terms of where they are, how they think, and how that drives the decisions they make. Kegan approaches this reality by starting with a big idea and then breaking it down into components and layers. Torbert and Cook-Greuter approach from observing people's behavior in the world through the language that they use and situation analysis. The salient learning is that we can now be more purposeful, intentional, and impactful by focusing on how we engage with our team and our clients to promote a different way of engaging and being.

Both Torbert and Kegan are aligned in their preoccupation with changing perspective. As sales and business coaches their work now elevates our ability to open people's mindsets to different ways of seeing the world and interacting within it. As part of this new awareness, we will now constantly question whether the activities and consulting structures we apply are targeted at triggering reflection, a mental process or establishing integration which are both social and relational processes. We now see that a single activity cannot fully achieve all these things. We must see how we design and develop interventions differently (Bachkirova, 2009).

These core concepts weave together towards an expanded awareness that vertical development is not just an academic or commercial endeavor, it is a lifetime quest. It is about a "meaning system" that is transformed and transformative in restructuring a new and expanded self-theory that drives the story we tell ourselves about ourselves.

In doing so we returned to the reality that for vertical growth there is a need for support and challenge from the environment in which one resides. Threats to growth are contextual. Human beings have developed defense mechanisms in response to physical threats or perceived threats. These have become deeply embedded in our behavior and unconscious habits. Cook-Greuter speaks to the reality of "selective inattention" and references Loevinger's salient quote "the ego maintains its stability, its identity, and its coherence by selectively gating out observations inconsistent with its current state thereby granting that one's coherence is another person's gibberish" (1976, p. 41). Transitioning to a new level of mental complexity or stage of ego development requires letting go. This can be traumatic, painful, stressful and takes time and constant support.

Cook-Greuter speaks to the reality that vertical development also occurs over a lifetime. In that case, the whole previous meaning system is transformed and restructured into a new, more expansive, and inclusive self-theory of the world. She estimates that it takes approximately five years to move to a new level when circumstances are favorable, and the person is open to change. It takes minimally a year of a well-designed developmental program for participants to shift to a new level (2013). This aligns with our engagement model with clients as we typically engage for a four-to-five-year development cycle to accomplish a sales and cultural transformation. We have found this is essential to create “loyalty to the logic of the change” on an individual and organizational level and gain the buy-in and support from all key functional areas. This reality of going longer and deeper with our engagements has created a design theme we refer to as “covenant client” relationships. Not only is it a necessary reality for the transformation, it provides a deep satisfaction for us and our team members as we feel a true sense of fulfillment in seeing the felt change transform how people see themselves, their customers and their colleagues

Furthermore, Cook-Greuter offers an illuminating insight referencing a study by Manners, Durkin and Nesdale (2004) indicating that interventions need to target a step or two above those for whom they are designed otherwise there is little change. Even if there are observable advances in ego maturity, we can never be sure that the well-conceived developmental program that promotes the vertical development has efficacy. Vertical development ultimately incorporates various levels of identity formation, as well as personal and organizational transformation, of one’s view to a broader and more inclusive worldview (Cook-Greuter, 2013).

Cook-Greuter emphasizes the concept of “differentiation” as a key process during transition phases. Differentiation, in the context of Cook-Greuter’s framework, refers to the ability to separate oneself from a previous way of being or thinking and to develop a new perspective or identity. It involves breaking free from the limitations of one’s current state of ego development and expanding into a more complex and integrated sense of self. This process often occurs during major life transitions or transformative experiences (2013).

The transitions between these stages involve a process of differentiation, where individuals challenge their existing beliefs, values, and assumptions, and explore new possibilities. During these transition phases, individuals may experience a period of disorientation, confusion, and a

sense of “in betweenness” as they let go of old ways of thinking and being. The process of differentiation involves separating oneself from the familiar and entering a stage of exploration, inquiry, and self-reflection. It is an active and transformative process that can lead to personal growth and expanded awareness (2013).

Finally, Cook-Greuter poignantly points out the role of suffering, not as a prerequisite for transformation but often as the companion in a move to a new level. We were impacted by her description of the crucible of the loss of loved ones, serious illness, disasters and other “slings and arrows of outrageous fortune” (2013, p. 9) are all potential levers for reorienting and restructuring the human state. We have also come to understand that across stage models of development, higher stages do not mean you are a better or well-balanced individual. Higher stages are also not related to intelligence (2013).

In summary, we are drawn back to Kegan as he asks; what is really demanded of us and of our minds in order to succeed in our many adult roles as parents or partners and as workers or citizens? We all spend some portion of our adult lives ‘in over our heads,’ i.e., trying to tackle a hidden curriculum that is more complex than we are; and that most of us do not construct the world in the self-authoring way that is required to thrive in a modern world. (Bachkirova, 2009)

As we observe the current global and national landscape, it becomes apparent that many leaders find themselves overwhelmed and ill-equipped. Kegan explicitly articulates the need for a leader, regardless of their political affiliation, who is not “in over their heads.” He asserts that a significant amount of individual and collective hardship stems from the disparity between the complexity of the world’s challenges and the complexity of our mental frameworks. He believes there are only two solutions to this: either the world must become less complex, or people have to become more so. The first is not going to happen, and for a long time people believed the second was not possible which accentuates Kegan’s authentic motivation to mitigate and reduce human suffering (Bachkirova, 2009).

While the concept of vertical development has gained popularity in the domains of leadership and personal development, it is not without its critics and dissenting voices. Broadly speaking critiques come at two very different levels; the moral argument that stage models imply that

higher levels are somehow superior and that therefore we need to create more superior beings. In a recent critique entitled “stage theory is BS”, Nora Bateson articulates this position well as she rather dramatically compares stage theories to the kind of thinking that led to eugenics (2021). At the more prosaic level critiques focus on the paucity and skewed nature of the data that supports many of these models. Both these arguments have implications for the way we conduct our practice but we will focus mainly on the later of these two modes of critique. The common critiques and dissenting perspectives regarding vertical development emphasize the lack of solid empirical evidence to support its claims, contending that the research is limited and often relies on self-reported measures. Secondly, cultural bias and other critiques have emerged indicating that the existing theories and frameworks are predominantly from western perspectives and may not adequately consider the diverse cultures in which individuals develop. Thirdly, the individual focus of vertical development tends to place a strong emphasis on individual growth, and some argue that this approach neglects the social cultural and systemic factors that influence development. Additionally, is the concern of a lack of practical application. Critics argue that while vertical development offers conceptual frameworks it often devoid of practical guidance for individuals seeking growth and transformation.

Ann Brooks and Sarah Constantin argue that Kegan’s stages oversimplify the complex nature of adult development indicating it is far more nuanced and multidimensional and involves a variety of factors that cannot be neatly categorized into discrete stages. Further, there are concerns that both Kegan’s and Torbert’s work lacks cultural and contextual considerations in that it does not fully capture the experiences and challenges faced by individuals from different cultural backgrounds and socio-economic statuses. Of further interest is the critique that Torbert’s work has a bias towards action-oriented individuals and may not adequately capture the experiences and development paths of individuals who are more reflective or introverted by nature. Despite these critiques the broader message that echoes through both camps is that to function effectively in an increasingly complex and chaotic world adults need to develop to higher levels of mental capacity and this in turn requires us to carefully design our consulting interventions and be respectful of the demands we place on the individuals and teams with which we work (2017).

Additionally, Ann Brooks (Brooks, 2004) has more specific criticisms of Kegan's work. First, she argues that Kegan's theories lack clarity in their central concepts and ideas. She suggests that

his book, *In Over Our Heads*, is overly theoretical and abstract thus making it difficult for readers to grasp and apply its insights. Brooks also takes issue with Kegan's emphasis on cognitive development as the primary driver of human growth. She contends that Kegan overlooks the importance of other factors such as social and emotional development in shaping individual's capacities and experiences. Brooks criticizes Kegan's portrayal of individuals who are in over their heads. She argues that Kegan's characterization of these individuals as incompetent or deficient overlooks the complex social and structural factors that contribute to their challenges. Brooks views this as an oversimplification that ignores the systemic issues at play and places the blame solely on individuals, which she deems unfair. Finally, Brooks takes issue with the book's lack of diversity and inclusivity. She argues that Kegan's analysis and examples predominantly draw from the experiences of privileged white male individuals, thereby neglecting the perspectives of marginalized groups. She asserts that this omission limits the book's relevance and applicability in a diverse society.

Constantin expounds on her critique of the concept of adult development stages and challenges the notion of their reality, beginning with questions regarding the empirical evidence supporting the existence of discrete and universal stages. She argues that the research conducted thus has limitations such as small sample sizes and potential bias with which undermine the findings. She also highlights the lack of clarity and consistency in defining and delineating the developmental phases. She argues that different theorists and researchers propose different stage models, making it a challenge to establish a consensus or a coherent framework (2017).

Furthermore, Constantin critiques the reliance on self-reporting to assess and categorize individuals in developmental stages. She argues that self-reporting measures are prone to biases and may not accurately capture the complexity and nuance of adult development. Constantin suggests that alternative methods such as behavioral or objective measures should be considered to provide more reliable evidence for the existence of developmental phases. Additionally, she questioned the assumption that individuals progressed through stages in a linear and hierarchical manner. She argues that adult development is influenced by a multitude of factors, including environment cultural and contextual influences. She suggests that stage theory fails to account for these complexities adequately and fully (2017).

Snowden (2022) critiques Kegan on the basis that vertical development theory lacks empirical evidence and is based on subjective and anecdotal observations. Torbert and Herdman-Barker defend and provide a counter argument to Snowden's critique (2022). Whilst they acknowledge that empirical evidence is important for validating theories, they argue that vertical development is grounded in extensive research and observation from various disciplines, including psychology, sociology, and adult education. Snowden views the stages not as a linear series of steps but rather as modulators that are always present, but which exert different levels of influence or attraction depending upon the unique context, his view is rooted in complexity theory and complex adaptive responses. In essence he is arguing that demonstrating higher levels of cognitive complexity is not just the province of the very few but something that most people can exhibit some of the time in some situations (2022). As coaches therefore our role is in elevating the capacity of salespeople to recognize these possible alternative narratives of an emerging situation and develop and practice a different suite of response strategies.

Additionally, Torbert and Herdman-Barker (2022) highlight that vertical development theory has practical applications in fields such as leadership development and organizational change. They argue that understanding the six stages of adult development can help leaders and organizations better navigate complex problems and make it more effective decisions. In this contrasting perspective, Torbert and Herdman-Barker assert that while empirical evidence is crucial, the vertical adult development theory offers a valuable perspective on understanding human development and its implications for leadership and organizational effectiveness. They argue that this theory provides a nuanced understanding of individual growth and can contribute to the development of more adaptive and resilient people and organizations in an increasingly complex world (2022).

Torbert's thinking and models help illuminate how a salesperson's approach might evolve over time. For example, a sales professional operating from the expert-action logic level might be highly skilled in a specific sales technique yet may struggle with flexibility or adaptability in a complex operating environment. We perceive top sales performers in the past operated at expert and achiever levels. Future sales organizations will need to cultivate higher-level developmental stages and ways of action to operate effectively in the fourth era of selling (See Figure 7). Whilst this represents a small

percentage of the population it will be an essential profile for effective sales organizations in the future.

Both Kegan and Torbert's perspectives align in that individuals gain an expanded perspective and become more capable of dealing with complexity, ambiguity, and paradox as they move through each stage or action logic. Their bodies of work underpin how individuals can move beyond being shaped to shaping the environment itself. This transformation is crucial for salespeople that seek to excel in their role in a future of complexity, disruption, and artificial intelligence as it enables them to navigate complex sales situations, make more deep and meaningful connection with customers, and contribute to their organizational goals in new and innovative ways.

In conclusion, both Torbert and Kegan's perspectives are exceptionally relevant to profession of sales and the academic foundations that underpin the industry. Their research both examines and guides how professional salespeople grow and change throughout their career thereby both affecting and creating their behaviors, actions, and meaning-making processes.

This critical analysis of adult vertical development informs our thinking and pedagogic strategies and tactics activating vertical learning in the sales profession which we elaborate upon on pages 148 - 160. Bateson's cautionary voice about the dangers of elitism and the idea that people operating at a higher level of mental complexity are better or superior (2021) and therefore should be valued above all others, reminds us to be careful as we introduce aspects of vertical development that we do not foster an unhealthy power dynamic or sense of entitlement. Snowden's critiques that stage models can play into the ego of some coaches who see themselves as the legitimate guide to a singular path of enlightenment (2022) which itself creates a form of dependence on the messenger rather than encouraging reflexive practice. Further, his critique that the deployment of higher orders of engagement are always context specific warns us to be open to the emergent complexity that sits within each and every consulting engagement and that one size does not fit all. Finally, the more specific critiques of the experimental logic and rigor of data collection that underpins all of these models (Brooks, 2004; Constantin, 2017) reminds us that all theories are provisional and are only valid until a better theory comes along. This accentuates our desire to constantly challenge our own understanding of the ideas and models that underpin our

practice and emphasize openness to new, dissenting viewpoints that we may integrate them into our evolving practice and way of doing and being.

Finally, this overall analysis of adult vertical development led us to further interrogate, reflect on, and re-examine our public works through the two interconnected lenses of *character science* and *mindsets* as the foundational enablers of who you are, how you think and behave, with the ambition of revealing insights and ideas that will evolve the practice and development of sales from the doldrums of one-level, horizontal training to integrate vertical development, enabling new ways of thinking and being.

2.1. Reflective practice construct

Our engagement with this doctoral program has challenged us to examine our own assumptions and competing commitments through a process of reflection in and on action (Schön, 1994) and a deeper reflexive engagement with our practice and situation (Fook & Beres, 2020). Our aim has been to transform sales practice but arguably we had not previously given sufficient attention to the importance of consciously and rigorously examining our assumptions as a mechanism to trigger transformational change (Mezirow, 1990).

The risk of a lengthy career spent working and consulting in marketing, sales, and account management is that our individual and collective thinking and action is based on our prior experiences and assumptions and that, as Mezirow suggests, “we are all trapped by our own meaning perspectives, we can never really make interpretations of our experience free of bias” (1990, p.10). The rapid and fundamental changes in the buying-selling ecosystem reinforce the need to critique and challenge the premises on which the sales profession operates and on which sales learning and development is based today.

Critical reflection through the lenses of sales mindsets and character science presents the opportunity to re-think our meaning perspectives, metacognitive understandings, and beliefs about the profession of sales. We are thus able to reevaluate the competencies of organizations and people that will enable sales success in future and to reassess how sales people will best learn, develop, and apply these competencies.

Among the various models of reflective practice, Donald Schön's discussion of Reflecting in Action aligns with our own approach. Schön writes, "If common sense recognizes knowing in action, it also recognizes that we sometimes think about what we are doing. Phrases like 'thinking on your feet,' 'keeping your wits about you,' and 'learning by doing' suggest not only that we can think about doing but we can think about doing while doing it. Some of the most interesting examples of this process occur in the midst of a performance" (1983).

Schön offers the analog of a major league baseball pitcher in order to illustrate the process of reflecting in action. Only a few pitchers can control the whole game by physical ability. The rest have to adjust their technique once they are out on the field of play. In doing so, these pitchers exhibit a particular kind of reflection. They adjust to the changing dynamics of the situation while the game is in progress: they must register how they have been pitching to batters and evaluate the success of these pitches; on the basis of these observations, they subsequently alter their technique. Subsequently, they are able to replicate the actions that prove successful. In this way, the pitchers demonstrate a type of reflection on their patterns of action, on the situations in which they are performing, and on the know-how implicit in their performance. They are reflecting on action and, in some cases, reflecting in action (1983). Schön's analogy captures our personal style of reflection.

Our own practice synthesizes a number of reflective practice models, such as those of Gibbs (1998), Borton (1970), and Rolfe (2001). We apply a pragmatic question-driven construct to critically reflect on our public works through the lenses of sales mindsets (Marcos-Cuevas, et al., 2014) and character science (Kiel, 2015). This approach aligns with the "insights to action" framework we employ with our clients.

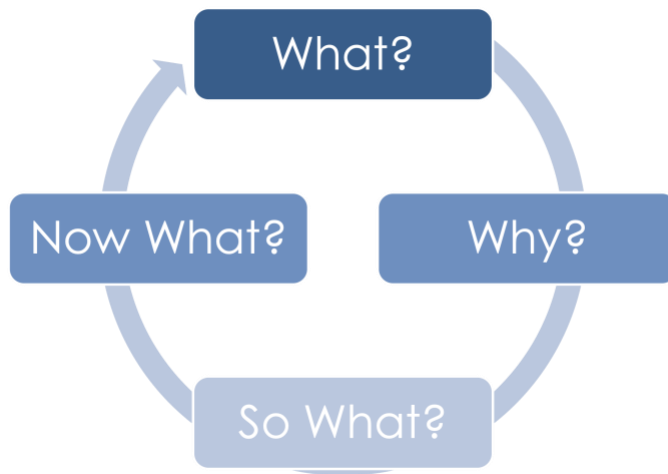


Figure 3: Reflective Practice Construct (Robertson & Styrlund)

In stage 1 we explore the *What?* We offer a detailed account of the situation, our own and our client's experience. This account of what happened can be characterized as strictly factual. It eschews analysis and poses questions such as:

- What was the situation?
- What was my role in the situation?
- What was I trying to achieve?
- What actions did I take?
- What actions did others take?
- What was their response?
- What were my feelings at the time?
- What were their feelings?
- What was going on around us?
- Was there anything unusual happening?
- When did it occur?
- Where were we?

In stage 2 we make sense of the experience and uncover the contributing factors and root causes by asking *Why?* questions. We follow the method developed by Sakichi Toyoda and later used at Toyota (Ohno, 1988). The types of questions we pose are the following:

- Why do I think things happened in this way?
- Why did I act in that way?
- What were some of the options I considered?
- Was time or activity a factor?
- Are there other contributing factors?
- What was done in the past?
- Why might others have acted the way they did?
- What was going on for each of us?
- How might my feelings and/or context have affected my choice of behavior?
- What are my assumptions about why things happened in the way they did?

Stage 3 concerns asking *So what?* These types of questions enable an evaluation of overall meaning and application. They provide the opportunity to discuss what went well, to analyze practice, and to delve into the implications of *what* and *why*. Asking *So what?* helps to identify areas needed for development and aspects of practice that did not work out as initially planned. *So what?* enables us to draw conclusions about what is needed to improve. Examples of these questions include the following:

- So what does this teach me or imply about me, us, our clients, or relationships and beliefs?
- So what was going through my mind as I reacted?
- So what did I base my actions on?
- So what other knowledge can I bring to the situation?
- So what could be done to make it better?
- So what is my new understanding of the situation?
- So what broader issues arise from the situation?
- So what might I learn from this?
- So what skill is needed to overcome limitations and realize opportunities?
- How might this change my future thinking, behavior, and interactions?

Now what? is the action-oriented stage 4 of our reflection framework. It enables a shift from insights to action by asking questions such as:

- Now what do I need to do?
- Now what broader issues, people, relationships, resources, and factors need to be considered if this strategy, plan, and action are to be successful?
- Now what might be the consequences of inaction and the benefits of change?

Dr. Phil Squire's (2021) sales mindsets and Dr. Fred Kiel's (2015) work on Character Science provide the core lenses through which we critically examine and reflect on the capabilities essential for the future profession of selling. We have harnessed Squire's and Kiel's research models and insights to create the conceptual underpinnings for our theoretical framework that sets out the sales archetype and fluencies that we argue are necessary for the future development of selling.

2.2. Lens #1: Character Science

Our first core lens of interrogation is the study of Character Science as derived specifically from the work of Dr. Fred Kiel. Kiel's research demonstrates that CEOs and executive-level leaders who frequently exhibit the four character habits of integrity, responsibility, forgiveness, and compassion significantly outperform their peers who do not demonstrate these traits with the same frequency. Companies led by CEOs whose employees awarded them high ratings for these character habits achieved five times greater financial performance, 26% higher employee engagement, and a reduction in corporate risk (Kiel, 2015).

Our hypothesis, to be validated in an ongoing research project, is that salespeople and sales leaders who exhibit Keystone Character Habits for Sales and Keystone Character Habits for Sales Leaders significantly outperform their peers against a number of criteria:

- Financial results demonstrated by profitable growth rates and market share;
- Customer commitment;
- Sales team member engagement and performance;
- Societal, organizational, and personal growth.

When using the Return on Character Assessment model, it is important to have a clear definition of character. This definition is not as simple as being honest or acting ethically. It is a more rounded definition that encompasses a variety of universal human beliefs, practices, and behaviors, which have been identified by scholars in the field of cultural anthropology. Character is the unique combination of beliefs and habits that motivate an individual and shape how that individual relates to others. Preferences are also observable (and measurable), but they are not very often changeable. One of the key aspects of this definition of character is that it comprises one's behavior in relation to others. This relationship with others is significant because it means that behavior is both observable (measurable) and changeable. Personality and style preferences are also observable (and measurable), but they are not very often changeable.

Return on Character focuses on four universal character habits that are most applicable to organizational life as opposed to family life or clan life. These habits are integrity, responsibility, forgiveness, and compassion.

Dr. Kiel's work is grounded in the study of human universals, which was developed primarily by Donald Brown, an American professor of anthropology who worked at the University of California, Santa Barbara. The framework of human universals is one of the most important theoretical platforms currently available to advance the study of human behavior. Evolutionary psychology and psychobiology are the tools for understanding human interaction and acknowledge the ongoing interrelation between culture and nature in determining the small number of causal conditions that account for most, if not all, universals (1991).

Human universals are of foundational importance to Character Science as they describe the "features of culture, society, language, behavior and mind" shaping human nature that are "found among all people known to ethnography and history" (Brown, 2004, p. 47).

Clark Wissler's universal cultural scheme adds a significant dimension to Brown's concept of human universals and provides a framework for the collection and presentation of ethnographic reports applicable to all societies. It is equivalent to the chapter headings and subdivisions of a standard ethnography and is therefore more a matter of "classification" than of "concrete trait-complexes." One of Wissler's core concepts is the idea of "reciprocal altruism", a behavior that has

been central to scholarly contributions in the field of anthropology (1923) and has relevance to our analysis and understanding of the interactions between buyers and sellers.

Drawing on the study of human universals, Dr Kiel's research identifies four core character habits that distinguish those whom he describes as "virtuoso leaders" from "self-focused leaders" (2015).

Character habit: Integrity

Definitions of *character* typically draw on the concept of integrity. Integrity tends to be valued in organizations because it is often emphasized as one of an organization's core values, which tend to focus on honesty and doing what is right. The key components of integrity include the following:

- Telling the truth;
- Acting consistently with principles, values, and beliefs;
- Standing up for what is right;
- Keeping promises.

Integrity contributes to building trust in an organization. However, building trust does not define what it means to behave with integrity. Integrity, when situated in an organization, tends to be associated with the following behaviors, which are extensions of the key components above and illustrate how they are often experienced within an organization:

- Communicating with honesty, straightforwardness, and frankness;
- Being transparent;
- Acting in accordance with the organization's values and rules;
- Not completing tasks in a perfunctory fashion with the aim of saving time or money;
- Expressing approval and support with sincerity and taking significant action as a result;
- Following through on commitments;
- Keeping confidences when asked;
- Keeping people informed of developments;
- Maintaining standards;
- Addressing performance issues consistently and honestly

(Kiel, 2015)

Character habit: Responsibility

There are two parts to the definition of *responsibility*. The first focuses on personal responsibility: taking responsibility for one's own mistakes, actively correcting those mistakes, and taking steps to learn from them. This first part of the definition is the more obvious explanation of responsibility. The second part of the definition of responsibility is about serving and enabling others. This service toward others means taking responsibility for one's impact and ensuring that that impact is beneficial for others and contributes to their advancement, and ultimately to that of the business.

The key components of responsibility comprise the following aspects:

- Taking responsibility for personal choices;
- Admitting mistakes and failures;
- Embracing responsibility for serving others and making a positive contribution to wider society.

These key components are equivalent to taking personal responsibility for actions. They do not preclude holding others accountable where necessary. Holding others accountable is a skill rather than a character habit.

Organizations place great emphasis on integrity. However, organizations would have more impact on outcomes if they placed greater emphasis on responsibility. According to Kiel, research has found that responsibility is correlated with some of the most effective behaviors.

The following behaviors are extensions of the key components above and illustrate how these components are often experienced within an organization:

- Admitting mistakes and failures;
- Acknowledging being wrong and accepting that others may be right;
- Taking action to correct mistakes and resolve problems;
- Learning from mistakes;
- Understanding the impact of one's choices and actions;
- Demonstrating concern for the community in which the organization operates;
- Removing barriers that prevent other individuals' progress;
- Proactively dealing with conflict.

(Kiel, 2015).

Character habit: Forgiveness

The values of integrity and responsibility, and their associated behaviors, are commonly endorsed in organizations. Dr. Kiel also introduces a unique habit, which does not tend to be discussed in a business context. The two *heart* behaviors are far less frequent. Forgiveness is especially uncommon, particularly in organizations where there are clear rules and guidelines. Forgiveness is not often thought to be appropriate in such a rules-based context.

The key components of **forgiveness** include:

- Relinquishing one's regret over past mistakes;
- Relinquishing one's resentment over others' mistakes;
- Focusing on what is right instead of what is wrong.

If the definition comprised simply ignoring or forgetting mistakes, then strict, rules-based organizations would be justified in their rejection of forgiveness. However, forgiveness has a specific definition. It is not about being lenient. High-character leaders are tough businesspeople with high expectations of their people. However, they balance those exacting expectations with a posture of forgiving readily when the right conditions are met.

According to Dr. Kiel, these are the specific conditions for forgiveness:

1. When the act is well-intended;
2. When the act falls within the accepted risk profile of the organization;
3. When forgiveness serves the goals and strategy of the organization.

Furthermore, successful leaders do not forgive misdemeanors until the 'guilty party' has demonstrated having learned from the mistake or failure. High-character leaders use these times as opportunities for meaningful coaching to help individuals learn from their mistakes.

In general terms, forgiveness is associated with the following behaviors, which are extensions of the key components above and illustrate how forgiveness is often experienced within an organization:

- Forgiving oneself and not punishing oneself unduly for past mistakes;
- Excusing mistakes when they result from good intentions and when the person has learned from the mistake;

- Not holding a grudge against people who have learned from their mistakes;
- Giving people scope to try new things and thus allowing them to take risks, test ideas, and make mistakes.
- Allowing people to learn from their own experiences (not micromanaging).

(Kiel, 2015)

Character habit: Compassion

Dr. Kiel argues that many people consider compassion an essential value outside of work, but that inside organizations, compassion is visible mainly in expressions of sympathy when someone experiences something difficult or tragic in their personal life. These kinds of expressions of sympathy are not what is meant by compassion. Compassion involves demonstrating that one truly cares about the people one works with. It means that one understands and empathizes with their concerns and, moreover, that one is invested in their success.

The key components of *compassion* include:

- Empathizing with others, i.e., understanding, being aware of, being sensitive to, and vicariously experiencing the feelings, thoughts, and experience of another (Merriam Webster Dictionary);
- Attempting to alleviate others' distress as a result of sympathetic consciousness of it;
- Asking for help;
- Empowering others;
- Actively caring for others;
- Being committed to others' development.

Compassion is closely related to the concept of empathy, which means feeling someone else's pain. Compassion involves empathizing and then being moved to alleviate another's pain. This element of empathy-driven action is what makes compassion a leadership habit.

The following behaviors are extensions of the key components above and display how compassion is often experienced within an organization:

- Truly caring about other people and respecting their identity, beyond their role in the organization as human capital;
- Listening to others;

- Taking the time to understand people's concerns, fears, and needs;
- Involving people in the process of making decisions;
- Asking for help;
- Offering help when others are having difficulty;
- Collaborating as part of a team;
- Facilitating the achievement of goals by other members of the teams;
- Paying attention to the development needs of employees and understanding colleagues desires and needs;
- Supporting people in achieving personal goals, even though they may not be applicable to their current role;
- Empowering people by giving them opportunities to learn and try different things.

(Kiel 2015)

The impact of the core four character habits

In his definition of character, Kiel notes the importance of behavior as part of the definition, as behavior is changeable. This variability also explains the focus on habits because habits are the result of reinforced behaviors. If one alters one's behaviors (the habits related to character), one can change one's character reputation.

Charles Duhigg asserts that habits are created in a specific pattern he calls the "Habit Loop." The Habit Loop consists of three elements: the cue, the routine, and the reward. People tend to focus primarily on routine, but what is important is the cue and the reward. By identifying a cue and providing the brain with a strong enough reward, one can teach oneself new habits (2012).

Character habits also play a significant role in driving business outcomes. Kiel considers this topic in his analysis of the origins of business results.



Figure 4: Business Results Drivers (Kiel)

The above image is derived from the classic model, which describes how macroeconomic conditions in conjunction with the business model of the organization equate with organizational results. However, extensive research that has examined and controlled for each variable has uncovered up to 30% left unaccounted for. This gap was regarded as the “error variance” until it was observed that this residue of “leftover value” changed significantly depending on who was leading the organization. It has since been regarded as the “CEO Effect” (Quigley & Hambrick, 2014). Return on character research illustrates that it is more aptly characterized as the “Leadership Effect” and that much of this effect can be explained by the leader’s character reputation (Kiel, 2015).

The implications for business are that 70% of what impacts business results is largely out of their control (macro-economic factors are out of businesses’ control and most industries have roughly similar business models). But businesses’ leadership effect is entirely within their control and constitutes a significant part of the results equation.

An additional essential element of Kiel’s research is the character curve. The character curve plots research participants from lowest character scores to highest character scores. Kiel isolates the top and bottom 10% and compares the differences. Several themes emerge from this comparison. Kiel finds that the leadership teams at the top possess:

- Higher ROA (Return on Assets);
- Higher workforce engagement;

- Lower levels of risk.

Kiel's research does not prove that leadership teams have higher engagement, ROA, and lower risk. Nevertheless, the results are consistent, measurable, and observable, as demonstrated by looking at the differences between the top and bottom groups:

- Consistent – patterns are consistent across categories;
- Measurable – there are clear differences in the scores and ratings for each group;
- Observable – there are differences in themes and in descriptions of the working conditions in the organizations at the top and bottom. (2015)

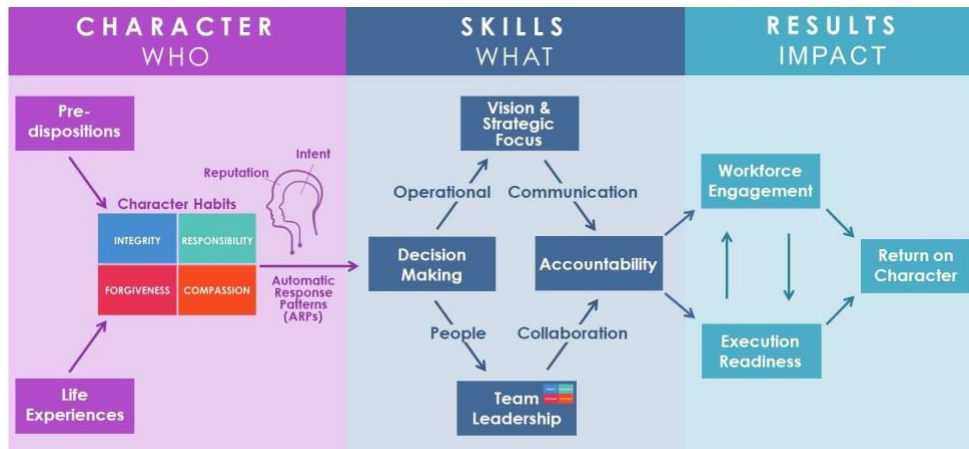


Figure 5: The Return on Character® Value Chain (Keil)

There are three main sections in the Value Chain: Character (who a leader is), Skills (what a leader does), and Results (the impact a leader has). The salient finding of this framework is that business (and sales) value can be created or diminished as a direct result of leadership. A leader's character is revealed through their decision making—through automatic response patterns (ARPs), such as volunteering the truth spontaneously when confronted, instinctively perceiving employees as individuals and not simply as a role within the organization, reflexively forgiving well-intended mistakes.

The two primary categories of decisions leaders make are people decisions and business decisions. First, with regard to people decisions, high-character leaders choose and develop high-character teams. Second, with regard to business decisions, high-character leaders establish the

vision and provide strategic focus, which yields clarity to guide others' decisions and energy. A high-character leader and their team articulate measurable goals and create a culture of accountability.

When leadership is composed of high-character, highly skilled members, it creates the conditions for positive organizational dynamics and workforce engagement. These positive environments energize employees with a vision, set clear priorities to support the strategy, and hold others accountable for their decisions and performance.

Employees' trust and respect for the character of management creates favorable conditions for workforce engagement because high-character senior leadership respects and cares for the workforce and ensures procedural fairness and support. These improved conditions, in turn, contribute to differentiated financial performance. Kiel's research reveals that virtuoso organizations are ones with superior innovation, adaptability, teamwork, collaboration, and communication. All of these positive features are made possible by a highly engaged workforce that has confidence in management (Kiel 2015). Another way to think about the ROC Value Chain is that high-character leaders and their teams create the conditions for an engaged, innovative, adaptive, and highly energized workforce – that will do the utmost to deliver on the vision and strategy.

We are particularly interested in the role of ARPs (automatic response patterns) in the process of decision-making. Kiel observes, "All of us are guided by our subconscious minds—perhaps more than we think. Character habits, acquired during our early years and modified throughout our lifetime, are a large part of our inner world, even though they operate mostly at a subconscious level. Many moral actions that define and express our character are the result of automatic response patterns (ARPs) that bypass rational thought" (2021, n.p.). These character habits often appear as our reflexive response to a given situation; they can be thought of as the unfiltered expression of our beliefs.

For over thirty years, analysts have debated the role of character in leadership. Most scholarly discussions comprise some aspect of the common wisdom that a strong character does not always equate with sound leadership or better business returns. Those who educate, hire, and train

business leaders should take careful note of the ROC findings that strong character—that of Virtuoso Leadership—does, in fact, drive better business results.

The data also reveal a second important finding for those who are invested in the success of an organization at any level: the fact that character is a habit—a collection of default behaviors that can be learned, unlearned, adopted, and adapted. The finding that character is a habit means that leaders can improve their character and, in the process, become more effective. Moreover, business leaders can work to instill standards of Virtuoso character throughout the organization.

In summary, Dr. Kiel's work has had a profound impact on our view of leadership, business, sales, and life. Kiel's key contribution to scholarship is his finding that character is paramount.

Leaders express character through their habitual behaviors, which are akin to all habits in the sense that they are alterable and can be changed voluntarily. When leaders effect deep and meaningful change, they can enhance their financial returns and multiple other aspects of the business. Virtuoso leadership can improve the lives of everyone it touches, including the organization's workforce, clients, community, and potentially the wider world.

Kiel's research thus gives the lie to the notion that serving environmental and social goals is incompatible with the success of the organization. In fact, the research clearly shows that, far from being incompatible, doing good and doing well in business contribute in equal measure to the creation of positive value. The work of Dr. Kiel and the KRW Research Team lends validity to a wise proverb that has had a deep impact on our worldview:

Watch your thoughts, because they become words.

Watch your words, because they become actions.

Watch your actions, because they become habits.

Watch your habits, because they become your character.

Watch your character, because it becomes your destiny.

(Ralph Waldo Emerson, Lao Tzu)

It is helpful to distinguish between character and ethics. Kiel articulates the differences between these two concepts: Ethics is a branch of moral philosophy which studies the values and behaviors

endorsed by any specific segment of society. For example, there are medical ethics and business ethics. Furthermore, the ethical codes of various segments of society nationally and globally can differ significantly. The common thread among most ethical codes is the specification of how to behave in a way that enhances the welfare of others – or at least does not harm others. Character, on the other hand, is a construct about an individual person or small group (such as a team). “We define character as the unique combination of beliefs and habits that motivate and shape how you relate to others. Character is an inner characteristic and most of an individual’s internalized beliefs and habits reside at an unconscious level” (2021. n.p.).

Character must also be contrasted with personality traits. Steven W. Martin distills the seven personality traits that distinguish top sales performers (2011):

1. **Modesty:** Contrary to the stereotype that regards successful salespeople as excessively assertive, ambitious, and egotistical, 91 per cent of top salespeople have medium to high scores of modesty and humility. The research also shows that ostentatious salespeople who display a bold manner with the aim of impressing their customers actually alienate far more customers than they win over. Instead of establishing themselves as the focal point of the purchase decision, top salespeople spotlight the team that will help them win the account—presales technical engineers, consulting, and management.
2. **Conscientiousness:** Eighty-five per cent of top salespeople exhibit high levels of conscientiousness, which manifests itself as reliability, coupled with a strong sense of duty and responsibility. These salespeople take their jobs seriously and feel deeply responsible for the results. The worst position for salespeople is to have relinquished account control and to be operating at the direction of the customer, or worse yet, a competitor. Conversely, top salespeople take command of the sales cycle process to control their own operations and results.
3. **Achievement orientation:** Eighty-four per cent of the top performers examined in the research score very highly in achievement orientation. Top performers are fixated on achieving goals and continuously measure their performance against those goals. During sales cycles, top performers in sales seek to understand the politics of customer decision-making. Their goal orientation instinctively drives them to meet with key decision-makers. Therefore, they strategize the people to whom they are selling and give prominence to how the products they are selling fit into the organization instead of focusing on the functionality of the products themselves.

4. **Curiosity:** An individual's yearning for knowledge and information can be characterized as curiosity. Eighty-two per cent of top salespeople score exceptionally high level of curiosity. Top salespeople are naturally more curious than their lesser performing counterparts. A high level of inquisitiveness correlates to an active presence during sales calls. An active presence drives the salesperson to ask customers difficult and uncomfortable questions in order to close gaps in information. Top salespeople are eager to know if they can win the business. Therefore, they seek to gain the necessary information as expeditiously as possible.
5. **Lack of gregariousness:** One of the most surprising differences between top salespeople and those ranking in the bottom one-third of performance is their level of gregariousness (preference for being with people and friendliness). Overall, top performers display on average 30 per cent lower levels of gregariousness than their below-average counterparts. Dominance constitutes the ability to gain the obedience of customers such that they follow the salesperson's recommendations and advice. The results indicate that overly friendly salespeople are too close to their customers and have difficulty establishing dominance.
6. **Lack of discouragement:** Less than ten per cent of top salespeople are classified as having high levels of discouragement. Salespeople in this category are not frequently overwhelmed with sadness. Conversely, ninety per cent are categorized as experiencing infrequent or only occasional sadness. In casual surveys we have conducted throughout the years, we have found that a very high percentage of top performers played organized sports in high school. Our surveys suggest a correlation between sports and sales success, as top performers are able to manage emotional disappointments, to recover from losses, and to prepare themselves psychologically for the next opportunity to compete.
7. **Lack of self-consciousness:** Self-consciousness is the measurement of how easily someone is embarrassed. The byproduct of a high level of self-consciousness is bashfulness and inhibition. Less than five per cent of top performers had high levels of self-consciousness. Top salespeople are comfortable fighting for their cause and are not afraid of rankling customers in the process. Top salespeople are action-oriented and are unafraid to call high in their accounts or courageously cold call new prospects.

Character Science as a Lens on Professional Selling and our Public Works

The Return on Character taxonomy constitutes a basis for our evolving approach to developing

the new sales leader and sales professional, the central tenets of which are as follows:

1. Those with strong character habits achieve stronger, more positive, and more sustained sales metrics. Character behaviors are more important than skill behaviors in selling.
2. There is a difference in reputation ratings between clients/customers and colleagues/team members when the subject is lower on the character curve.
3. There are different behaviors that are valuable for sales leaders as opposed to front-line colleagues.
4. There are certain keystone character habits for sales and sales leadership, which can be pinpointed.

Three insights emerge from character science and its application to the profession of selling. The first of these insights is self-evident. An individual's life and business experience readily bear out the intuition from character science that *'who one is matters as much or more than what one does.'* The industry of sales training has largely embraced a "doing-based" approach by emphasizing the importance of acquiring and accumulating techniques better suited to persuading the customer to buy. However, the customer increasingly has more information than the supplier. The ethos of our firm is based on the concept of alignment, i.e., aligning the company's capabilities to customers' priorities. This alignment is predicated more on listening and questioning than on talking and pitching. Furthermore, the emerging contextual forces in professional sales can be traced to the core value of high character. Given the uncertainties of contemporary business, sales professionals now need to be trusted strategists. Character is central to customer engagement, trust, commitment, and ultimately enhanced financial results. Customers not only seek solutions; in addition, they seek partners who will collaborate in finding direction, developing strategies, and executing common goals. In facilitating alignment and providing this direction, the character and trustworthy nature of the sales professional matters as much as any sales technique.

The second insight that emerges from character science is related to its focus on the relationship between one's expressed values and one's experienced values. Character science directs our attention to others' experience of us. How others experience a sales professional is primordial. As business-to-business (B2B) selling moves more to an omnichannel model, the amount of direct contact with customers is decreasing, and yet the value and impact of these interactions needs to increase. This phenomenon is encapsulated in the need for 'real-time relevance'. Real-time

relevance constitutes the ability to be relevant to any individual at any level, in any company, and at any time. Given this need for relevance, it is essential that sales professionals have clear and valid view of how they are experienced in these critical moments of interaction. Yet there is often a gap between a person's intent and how they are perceived and experienced. Our ongoing Character Science for Sales research seeks to uncover the extent and nature of this gap and leverage it, as a diagnostic vehicle, to reveal blind spots and develop a plan and learning path to align individual and organizational sales behaviors (keystone character habits) more closely with intent.

The third and final insight that emerges from character science relates to the critical importance of vertical development for sales. As a result of this process of working on the doctorate, we have undergone a major shift in our thinking, individually and as a firm: we are persuaded of the need to change our approach and consulting from the simple development of horizontal acumen to the additional generation of vertical strengths.

Our firm and consulting practice has, historically, focused on horizontal development: the addition of greater sales knowledge, skills, and competencies. This type of development characterizes the content of one's knowledge, which can be measured through 360-degree feedback and, ultimately, sales results. By contrast, vertical development refers to advancements in an individual's capability to think in more complex, systemic, strategic, and interdependent ways. This type of development thus relates not to the content of thought but to the way in which one thinks, and it can be measured through stage development interviews and surveys. The problem for most sales professionals is that they already have, or have access to, ample knowledge about sales process, tools, and techniques. They are already familiar with much of this content, even if they might still be unable to apply this knowledge to their current practice. The limiting factor, we surmise, is no longer the content (the sales person's knowledge); it is the receptacle itself (the sales person's mind). The aim of vertical development is not to add more to this receptacle, but to grow the size of the receptacle. Making character central to sales outcomes constitutes a means of increasing the size of the receptacle of sales insights and expanding the sales professional's capacity to think, feel and act in their increasingly complex, omnichannel operating environment.

Extrapolating on Kiel's leadership effect research, we hypothesize that character-based sales vertical development will have a significant impact on sales outcomes and overall business results.

If the personal leadership effect generates a contribution of approximately 30 per cent to the business results of a company, what, we ask ourselves, can the effect be for sales?

This leadership effect is becoming more noticeable among companies that strive to recruit the most effective leaders. Ultimately, the most talented employees want to work for firms in which they can find meaning, purpose, and leadership with high and consistent character behavior.

In summary character science for sales, and our future focus for sales development, seeks to:

- Reveal the unintended gap, or blind spot, between intent and how a person, or organization, is experienced by internal business partners and customer stakeholders. This awareness will be essential in an increasingly complex operating environment demanding real time relevance, collaboration, co-creation, teamwork, and trust.
- Identify the keystone character habits that have the greatest impact on sales results and outcomes.
- Integrate vertical development into our horizontal learning practice, as the vehicle to close this intent - experience gap, develop keystone habits, and expand the capacity of sales people and organizations to think, feel, and act in the new era of selling.

2.3. Lens #2: Sales Mindsets

The second lens through which we examine our public works is mindset, with a focus on the concept of “sales mindsets” developed by Dr. Phillip Squire. The two lenses of mindset and character are interconnected and interdependent and, in the context of the role of sales and account management, are encapsulated by the expression: “who you are and how you sell will matter more than what you sell” (Styrlund & Garramone, 2022, n.p.). As illustrated in Figure 6 we seek to explore and make explicit the linkages between character, who you are, and mindsets, how you think.

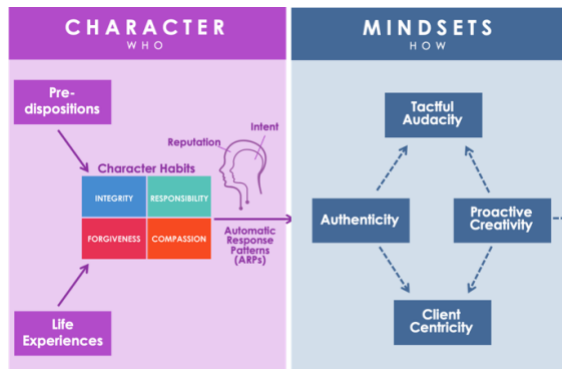


Figure 6: Linkage between character science & sales mindset lenses (KRW, Squire, Styrlund, Robertson)

We envisage that character and mindset will enable and govern essential capabilities, or fluencies, for the future of sales which will even surpass the importance of the products and services being sold.

The evolution of sales as a profession over four eras helps to contextualize the growing importance of character and mindset. Steve Jobs' observation, "You can't connect the dots looking forward; you can only connect them looking backward" (2005, para. 9), provides a rationale for using a historical lens to understand the future demands on sales. We seek to connect the historical dots of selling in order to foresee what the future sales environment and role of the sales professional may look like and to explain why mindset and character science are anticipated to become increasingly important.

Each successive shift from one selling paradigm to the next reflects changes in the context of the selling/buying environment driven by three primary factors:

1. **Asymmetry of information and a proliferation of engagement channels enabled by artificial intelligence and technology:** The quantity of data available has been amplified by technological developments, which have influenced the ability to leverage data to improve decision making and provide actionable insights (McKinsey & Company, 2016). The current environment has affected information asymmetry (Akerlof, 1970) from seller to buyer and, increasingly towards the end-user or consumer, fueled by social media and search engine optimization algorithms (Bowman, 2019). Additionally, there has been a rapid expansion of the number of channels through which customers can access data and interact with suppliers, from five channels in 2016 to ten in 2021 (McKinsey & Co., 2022) further increasing complexity and

challenges in orchestrating buyer-seller interactions and accentuating the imperative of ‘real-time relevance’ in the human interaction moments that matter in an omnichannel selling environment.

2. **Increasing complexity and the rise of wicked problems** in the selling/buying environment:

This complexity is evident in the number of decision influencers, the extension of length, time, and stages of the selling/buying cycle and the dynamics of globalization. These different factors influence the ‘job to be done’ (Ulwick, 2016), which, in turn, is influenced by the complexity of products, services, and solutions, their scope, and the number of competing options to consider. These complexity factors impact the buyer’s perceived risk in making and implementing decisions. Yaneer Bar-Yam observes that increasing complexity of the world mirrors the way people work together (2004). Adamson identifies the reasons for the increased complexity of buying and selling: “Buying complex solutions, such as enterprise software or manufacturing equipment, has never been easy. But with a wealth of data on any solution, a raft of stakeholders involved in each purchase, and an ever-expanding array of options, more and more deals bog down or even halt altogether. Customers are increasingly overwhelmed and often more paralyzed than empowered” (2017, para. 2). Understanding the evolution of complexity in business and the selling/buying environment is essential to tracking the development of sales over time. It provides insights into the capabilities that will be key to the profession of selling in the future. Snowden’s thinking and the Cynefin framework can be applied directly to sales. The business and sales environment are becoming more complex, yet many sales organizations continue to operate with the flawed fundamental assumption of organizational theory and practice: namely, that there is a certain level of predictability and order in the world (D.J. & Boone, 2007). As a result, the simplifications arising from common leadership approaches, which were useful in an ordered, linear world, no longer work in the evolving, complex context of B2B sales.

As we interrogated the nature of wicked problems (Rittel & Webber, 1973), we began to see that they represent a fundamental structure that will shape the future of society, the economy, commerce, and the profession of sales. Wicked problems are by nature complex, ill-defined, and multifaceted. They cannot be solved using the traditional thinking and approaches that created them (Camillus, 2008). These problems are characterized by high levels of

uncertainty, deep interconnectedness, and by the wide scope of stakeholders, often with competing interests.

This reality of ever increasing complexity in the business-to-business ecosystem led us to explore transdisciplinarity and revealed the ways in which this style of thinking, coupled with the notion of cognitive diversity, is integral to the process of effectively addressing a future characterized by an abundance of complexity and wicked problems.

Transdisciplinarity also provides the guiding thread that knits together the interrelationships of character science, mindsets, and vertical learning. It will play a crucial role in addressing a future marked by wicked problems in the realm of professional selling, for the following reasons:

- First, in the future there will be a greater need for stakeholder inclusivity. Transdisciplinarity requires active engagement and collaboration among key stakeholders to facilitate the development of equitable, inclusive, and creative solutions.
- Second, wicked problems call for holistic approaches. Such problems cannot be solved simply by breaking the problem into its constituent parts, or into a series of smaller problems. Wicked problems comprise deeply interconnected elements that have an impact on one another. By its very nature, transdisciplinarity encourages holistic thinking, or as we have described it “seeing things whole”, which enables the creation of strategies and solutions that account for the multiple dimensions that make up the wicked problem.
- Third, there is a need to integrate knowledge from a diversity of contexts and cultures. Wicked problems require the integration of knowledge from multiple perspectives and stakeholders. Transdisciplinarity guides collaboration across boundaries which is essential for understanding and addressing the very nature of complexity that lies at the origin of wicked problems. Wicked problems require adaptive and creative solutions. Transdisciplinarity promotes broad and nuanced thinking, combined with adaptable approaches, that can respond to the changing nature of the problem.

Our exploration of transdisciplinarity and transdisciplinary thinking has been influenced by the research of Sue McGregor (2015), Basarab Nicolescu (2008), and Alfonso Montuori (2013).

McGregor's perspective on transdisciplinarity focuses on the need to transcend cultural and disciplinary boundaries, to integrate multiple forms of knowledge, and address problems with innovative approaches, while retaining an intimate preoccupation with value and ethics. In addition, McGregor calls for cognitive diversity, which is promoted by encouraging the involvement of diverse stakeholders, or divergent others, who co-generate new knowledge (2015). McGregor provides a cogent framework that identifies the level of knowledge required for integration in transdisciplinary research and in the development of solutions. The elements of this framework distinguish between the disciplinary, multidisciplinary, interdisciplinary, and transdisciplinary levels. Each of these levels has its own characteristic processes and provides a different approach to knowledge creation. McGregor dedicates sustained attention to the overriding need for values and ethics. She is adamant that a shared set of values and ethical considerations must guide research and solution development. These values may include areas such as social justice, responsibility, human rights, and sustainability. In McGregor's analysis, the combination of disciplinary perspectives alone is insufficient; there is, furthermore, a need to integrate the insights and methodologies inherent in these individual disciplinary perspectives.

In contrast, Basarab Nicolescu's perspective on transdisciplinarity hinges on the idea that increasingly complex problems of the next generation will require new approaches to transcend the boundaries of traditional academic disciplines and structures (2008). Nicolescu argues that transdisciplinarity will be instrumental in addressing real world problems that simply cannot be solved by a single perspective, stakeholder approach, or discipline. Nicolescu offers a compelling analysis of transdisciplinarity as part of his three-pillar approach.

Pillar one is situated at the level of everyday reality. Here, Nicolescu proposes a perspective that involves a multidimensional ontology that takes account of the coexistence and interaction of different levels of reality. Part of this perspective is the recognition that each level is characterized by its own laws, rules, and structure. There is a need to explore the dynamics between the levels.

The second pillar comprises the logic of the included middle. Here, Nicolescu appears to

challenge the classic binary logic (true/false) and suggests the concept of the “included middle,” which creates a space for the simultaneous existence of contradictory elements. This approach creates a more capacious framework allowing a holistic comprehension of complex phenomena.

Nicolescu redefines the nature of complexity by recognizing the inherent reality of the world. He proposes tackling complexity by integrating diverse knowledge systems and methodologies. The integrative process requires collaboration among various disciplines and stakeholders, and thereby provides a more comprehensive, creative, and efficacious approach to solution creation and problem-solving.

In summary, Nicolescu’s meta-model is grounded in epistemology, ontology, and, as he terms it, the logic of the included middle: “knowledge is neither exterior or interior, it is simultaneously exterior and interior.” Nicolescu’s view of the indeterminacy of knowledge, and its fluidity as a concept, calls for an overarching ethic of shared knowledge that strives for a “shared understanding based on an absolute respect for the collective and individual otherness united by our common one and same earth” (2008, p151).

In addition to drawing on the insights of McGregor and Nicolescu, our understanding of transdisciplinarity builds on the work Alfonso Montuori who speaks to the joy of inquiry and the inquirer. Montuori’s approach to transdisciplinarity expands the intrinsic motivations of transdisciplinary research to encompass the individual’s passion and emotion (2013). Montuori’s thought and practice initiated new conversations around cultural diversity and relativism and brought these conversations into the mainstream discourse of transdisciplinarity. Montuori dedicates sustained analysis to the integrated nature of his national, cultural, and professional identities that do not fit into pre-existing categories. The type of music played by Montuori, and his band also defied the categorizations of labels or genres. Montuori’s scholarship aligns with his personal experience and actions to create a revolutionary definition of transdisciplinary thinking.

Montuori’s inquiry is grounded fundamentally in personal experience. His intentions as a scholar are not ethereal or confined purely to the academic realm. He issues an explicit

warning against “the sickly quagmire of narcissism” (2013, p14) and makes an eloquent argument for creative inquiry as a means to explore the world and to come to a better understanding of our multifaceted personal identities. Montuori’s humanized understanding of transdisciplinarity is characterized by an appreciation for the need of personality traits and skills that are aligned with an individual’s attitude. Montuori’s insight that individuals are intellectual risk-takers by their very nature provides sheds significant lights on the motivations and rewards of transdisciplinary practice.

Montuori offers an eloquent summary of the connections between his scholarship, personal experience, and teaching practice: “again, although this discussion takes me into deeply philosophical fields, it emerges out of questions in my own life, and has found applications and articulations in my own teaching. What I am looking for in the process of my inquiry is always returning to its applications and implications for my life and, and more broadly, for how we, as human beings, make sense of the world, how we live our lives together. Unless it’s grounded in experience, and the possibility of making a difference in my life and that of others, it has little interest to me” (2013, p. 225).

Montuori’s analysis of transdisciplinary practice evokes the ancient concept of having a beginner’s mind. At the core of transdisciplinarity is the quest to approach life, problems, and opportunities with a mindset that lies at the intersection of a number of spiritual practices. The teachings of Christianity and Buddhism can help to illuminate our understanding of transdisciplinarity as the embracing of a beginner’s mind. The teachings of Jesus and Buddhist Zen masters are united in their appeal for students to practice a beginner’s mind.

Jesus’ references to children as a model to emulate are, in effect, a proclamation of the value of the beginner’s mind. Whenever the disciples exhibit excessive pride in their religiosity, Jesus brings a child before them as a kind of admonition. In Matthew 18:3 he tells the disciples, “I’m telling you once and for all, if you do not go back to square one and start over like a child, you will never be able to see the new reality” (2011). Jesus welcomes children into his teachings when the disciples are discussing topics that to this day lend themselves to heady, ideological discussions. He tells them that their quest to determine who is right and wrong is a poor use of time and reprimands them: “You’re not seeking truth; you’re seeking to

be in control.”

As we age, we become disillusioned, hurt, and disappointed by what life brings to us; these displeasures create barriers to the beginner’s mind. We can easily lose sight of the delight and curiosity we once exhibited as children. The goal of the beginner’s mind is never to presume that our perspective is entirely accurate and to strive to see things anew. It is hard to embrace this perspective of innocence and vulnerability that is predicated on an honest admission that we do not possess all of the answers.

The Latin concept of *tabula rasa* is intimately connected with the concept of the beginner’s mind. When we envisage human beings as a blank slate ready to be written upon, we recognize the virtues of the beginner’s mind. Life is about seeing; it is not about earning or achieving. It is about relationships, rather than results or requirements. Seeing things anew is an important first step to making the imaginative and creative leaps at the core of transdisciplinary practice. Richard Rohr (2003) puts it eloquently: “we don’t need to push the river because we’re in it. Life is lived within us, and we can learn how to say yes to that life.”

Finally, our exploration of transdisciplinarity, applied to complexity and wicked problems, revealed Tanya Augsburg’s illuminating and pragmatic perspectives on factors contributing to transdisciplinary individuals. We uncovered unique connections between Augsburg’s four-level hierarchy that are wholly consistent with the behaviors and traits evidenced in higher order Character and Mindsets (2014) as captured in her central thought: “One is not born a transdisciplinary person. One learns from one’s culture and experiences, as well as by the cultivation of certain attitudes and competencies, how to become transdisciplinary” (p244).

3. **Rising importance of trust, teamwork, and collaboration in selling and advancements in the science and understanding of human behavior:** Sales effectiveness has been enhanced by step changes in our understanding of human behavior, decision making, the processing of information in the brain, and the role of emotional intelligence in influencing behavior change (Brown, 2014). Hoffeld gauges the changes to sales as a result of these scientific advances: “There has been an astounding number of scientific breakthroughs in the last few decades that have disclosed how humans are influenced and how the brain processes information. These

scientific advancements have been proven to significantly enhance a sales person's sales effectiveness as they collaborate and lead teams and interact with customer stakeholders throughout the selling-buying cycle. However, within the discipline of selling, this proven science has been ignored as selling practices have remained virtually unchanged" (2016, p. 192).

The interplay of these factors and key drivers helps to explain how sales has evolved over the four selling eras as visualized in Figure 7 and described below.

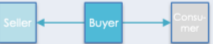
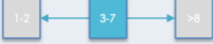
Selling Era	#1 Persuasion	#2 Problem Solving	#3 Business Advantage	#4 Value Co-Creation
Timeframe	1700s – 1960s	1970 – mid-1990s	mid-1990s – 2010s	2010s – present
Information Asymmetry Access To Relevant Information Not Known By Or Available To The Other				
Complexity Of Jobs To Be Done				
Channels Number of Customer Engagement & Communication Channels				
Sales Teamwork Level of Cross-Function Teamwork Required By Selling Organization to Engage Customer, Create Solutions & Deliver on Outcomes				
Trust & Collaboration Level of Trust & Collaboration Required Between Buyer & Seller To Contract & Deliver on Outcomes				

Figure 7: Drivers across selling eras (Styrlund & Robertson)

Selling Era #1: Persuasion: 1700s – 1960s

In the industrial economy, organizations focused on enhancing quality and efficiency to gain competitive advantage (Birkinshaw, 2018). Marketers played a key role in deploying mass media marketing campaigns and in equipping salespeople with selling scripts. The sales role was to present the product by focusing on features and leveraging information asymmetry to persuade potential buyers. Information asymmetry was a source of power for salespeople. The origin of professional selling can be traced to 1752, the year Benjamin Franklin founded America's oldest, continuously active insurance company (Insurance Journal, 2011). At this time, insurance and many household goods were subscription products, with sales representatives capitalizing on the opportunity and then making regular in-person visits to collect monthly payments. Successful

salespeople had little time to prospect or sell because of the time invested in collecting monthly payments. To resolve this misallocation of time and resources, the insurance industry developed the role of Account Executive/Hunter (those employees who wrote new business) and that of Account Manager/Farmer (those employees who collected the weekly premiums). This specialization of roles improved the efficiency of the sales structure, and the successful innovation was soon adopted by other industries outside of insurance. Role specialization and process improvement are the first major advancements in the history of professional selling. During this era, the seller's agenda was to get the customer to do what the seller wanted. Sales training focused almost exclusively on three areas: presenting, handling objections, and closing. The skills were grounded in stimulus-response and compliance theories and employed techniques grounded in the proven psychology of scaled commitments, reciprocation, compliant behavior of similar others, and cues of legitimate authority, scarcity, and friendship (Sullivan, 2003). Selling in this era can be characterized as a simple, mechanistic, and linear process. Although still evident in some industries today, this win-lose approach largely ran its course as customers developed defense mechanisms, formed professional buying functions, and as more competitive options became available. As complexity in the selling cycle and buying process increased, the axis of information and power began to shift in favor of the buyer.

Selling Era #2: Problem Solving: 1970 – mid-1990s

This second era of selling emerged in the early 1970s, with Larry Wilson's "Counselor Approach" (2007) and Mack Hanan's "Consultative Approach" (2011). Understanding the needs and requirements of the customer became central to the problem-solving role of the sales person, who now focused on questioning, listening, analyzing the customer's needs, cultivating trust, and building a relationship with the customer. Techniques were aimed at developing an understanding of the customer's needs (defined as the difference between what the customer has and what the customer wants). The task of salespeople was to understand the customer's needs and then close that gap with their product, which was conceived as the "solution." The approach was characterized as "needs-satisfaction selling" (Sullivan, 2003). Questions were focused on the problem and on the solution. This approach was thus premised on the risky assumption that customers understood their problem and the solution.

Selling Era #3: Business Advantage: mid-1990s – 2010s

As markets expanded, companies became more globalized, and information technology sustained rapid developments, competition increased, and problems became more complex, selling techniques from era #2 were still necessary during this period, but they were no longer sufficient. The role of the B2B sales professional evolved in the late 1990s to salespeople needing to be perceived as a resource and as a source of competitive advantage, based on a profound understanding of the customer's industry and business. Selling skills required an understanding of the customer's business and thus comprised business process analysis and project management. The professional salesperson sought to be seen by customers as a source of business advantage.

During this era, shareholder demands for profit and returns placed increased pressure on sales organizations to be more efficient in the face of rising costs and complexity. As Bain & Co. observe: "For decades, scale economies ran like clockwork in the world of sales. Companies in business-to-business (B2B) markets consistently grew their revenues faster than their sales and marketing expenses. But... that trend has stalled and in some cases reversed. The sales models for many large companies have become more complex and less efficient, putting pressure on profit margins" (Bain & Co., 2013, p. 1).

Selling Era #4: Value Co-Creation: 2010s – present

Selling Era #4 is characterized by an accelerating shift in information access and asymmetry in favor of buyers, end-users, and consumers. There is increased complexity in the process of sales and buying, coupled with deep scientific insights into influence and decision-making and step-changes in the application of technology. Web 2.0, generative artificial intelligence, and digital technology are creating new possibilities and new channels for sales organizations and buyers to interact throughout the customer journey.

These changes to the sales landscape were accentuated by the Covid pandemic. They have had a profound effect on how customers buy and engage with suppliers. Research shows a steady transition of customer preferences from in-person sales interactions to digital channels. Today, a sales rep has access to approximately only 5% of a customer's total purchase time (Gartner, 2021). These changing customer buying preferences, coupled with the rise of robotic process automation, artificial intelligence, asynchronous selling techniques, and free trials, have caused the displacement of salespeople from transactional selling roles (Gibson, 2020).

These seismic shifts reframe the role of sales, from selling to being orchestrators of the customer's journey (Forrester, 2022). Salespeople must now optimize interactions across channels to maximize value and to enhance the customer experience at each stage in the customer engagement lifecycle. In this digital and omni-channel world, most B2B transactional, supply, and operational buyer/seller processes are managed via customer self-service portals and websites without human interaction. The mechanism of one-click shopping on Amazon is an illustrative example of these changes.

Our next-level account management research (Robertson & Cote, 2021) and empirical observations from engagements with Fortune 1000 clients indicate that, in future, the central purpose and role of the salesperson will be to facilitate the co-creation of differentiating, measurable value with clients. Salespeople will be entrusted with enabling clients to accomplish their strategic priorities and solve problems. Differentiating value creation can be understood as the “organizational capability to co-create ‘beyond the product/service’ value that addresses the unmet needs, pains & gains of strategic customers, with the ability to scale to other accounts.”

We anticipate that technological advances will not obviate the need for this new profile of salesperson. Collaboratively solving these complex problems and capitalizing on strategic opportunities will demand trust-based human interaction (both virtual and in-person) between salespeople, buyers, and other relevant business partners. While these human-to-human interactions may represent only a fraction of the time buyers invest in engaging with suppliers, we suggest they will generate a disproportionate share of the value created between buyers and sellers.

Our work continues to reveal the importance of the sales person as a trusted advisor, and prioritizes the sales and account management soft skills that will be essential to enable differentiating value creation in the future:

- **Growth Mindset:** A mindset oriented toward growth and learning will encompass the resilience, intensity, and tenacity to achieve tangible results despite increasing complexity, challenges, and adversity.
- **Strategic Thinking:** Critical thinking will need to be applied to complex problems in order to

navigate dynamic and uncertain environments, prioritize opportunities, manage risk, suspend solving, and plan for the future.

- **Leading High-Performance Account Teams:** The ability to lead high performance cross-business/matrix account teams without formal authority will be needed to develop strategy and plans collaboratively and to drive progress toward team goals.
- **Business Value Communication:** This type of communication will engage the customer in quantifying the value salespeople bring and will articulate monetized business impact for customers and their companies.
- **Building Trust and Commitment:** Collaborative engagement of stakeholders across value-networks and internal business partners with curiosity, authenticity, empathy, clarity of purpose, and outside-in orientation will require sales people of the future to effectively influence without formal authority and build trust and commitment in a virtual/hybrid world.

The same research indicates that the hard skills of processing, planning, and technical work will remain important, but less so when contrasted with soft skills like curiosity, empathy, active listening, collaboration, that are increasingly relevant and not so soft. These critical competencies will be humans' distinctive asset at a time where technology is ubiquitous (Fast Company, 2021). In other words, "the soft stuff is now the hard stuff, and the hard stuff has gone to the cloud" (Styrlund, 2022).

The fundamental, ongoing changes in the sales, go-to-market, and business environment that characterize the fourth era of selling will, we foresee, elevate the importance of new organizational and people capabilities based on trust, collaboration, leadership, creativity, and communication. These capabilities are grounded in character and mindset. One of the basic premises for learning in the twenty-first century is that skills are important but so are mind sets and dispositions (Thomas & Brown, 2011).

Mindsets are essential to who we are, how we behave, and how we present ourselves in the world. Squire observes that values and mindsets drive all behavior, visualizing the interaction of character, mindset, and values with behavior as an iceberg, and makes a compelling argument for the role of values and mindset in guiding behavior and interaction with people (2021). Professor Jean McNiff, an authority on action research, highlights the linkage between beliefs, mindsets, values, and

behaviors and emphasizes that “practices... are always informed by values” (2002, p. 143).

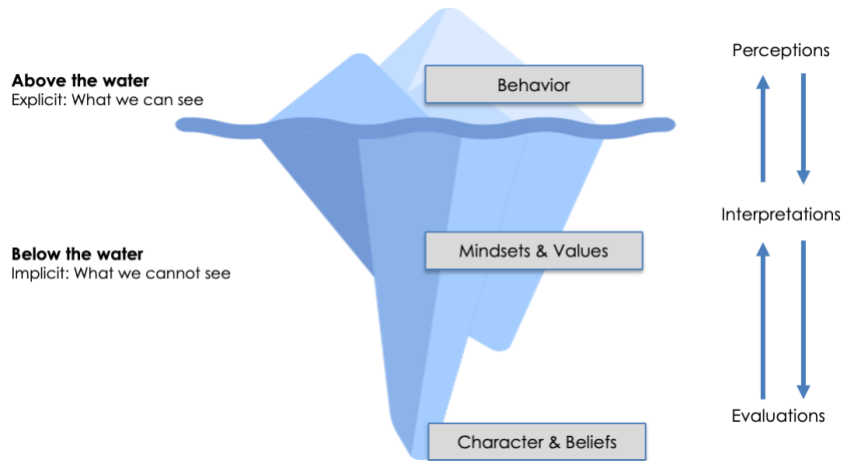


Figure 8: Character, Mindset & Values, and Behaviors Iceberg (Squire, adapted)

In the context of these historical shifts during the fourth era of selling, we suggest there will be three core mindsets essential to sustain organizational, learning, and sales performance in this period:

1. **Growth Mindset:** How we think will govern our ability to learn and grow, at a time when continued learning and accelerating acquisition of new skills are of paramount importance. The significance of a growth mindset is rendered more acute by the accelerating obsolescence of skills (Thomas & Brown, 2011), with estimates that the half-life of a learned skill approximates 5-years (Kasriel, 2017). The World Economic Forum's 2017 statement that “On average, a third of the skillsets required to perform today’s jobs will be wholly new by 2020” (World Economic Forum, 2017, p. 5) also lends credence to growing importance of a growth mindset.

Carol Dweck defines the concept of a growth mindset: “Individuals who believe their talents can be developed (through hard work, good strategies, and input from others) have a growth mindset. They tend to achieve more than those with a more fixed mindset (those who believe their talents are innate gifts)” (Dweck, 2016, para. 2). Dweck’s research highlights the value of a growth mindset versus a fixed mindset and emphasizes that while mindsets are an important part of personality, they are subject to change (Dweck, 2017). A growth mindset allows individuals to value their activities regardless of the outcome and to continue to thrive in the face of difficulties. Dweck notes that what sets brilliant people like Edison, Mozart, and Darwin apart

is their mindset and drive, not their innate intellect (Dweck, 2006). The concept of mindset helps to identify the key components in achievement: that is, why some individuals and organizations achieve less than expected and why some achieve more under similar circumstances with access to the same resources.

Jim Collins illustrates the stark contrast between growth and fixed mindsets in his “good to great” study of 11 companies that achieved exceptional returns and sustained performance for at least 15 years, relative to comparable companies in the same industries, which did not deliver or sustain high-level results. While the research identifies multiple factors that distinguish thriving companies from others, one factor, “level 5 leadership” stands out, and is exemplified by leaders with a growth mindset. These executives do not attempt to attract attention by leveraging ego and self-proclaimed talent. They are modest and constantly ask questions with the confidence and humility to confront difficult challenges. They face failure with equanimity while maintaining their confidence that they will succeed in the end. Collins describes level 5 executives as leaders with a paradoxical combination of personal humility plus professional will (2001). These leaders surround themselves with the most able people they can find. They accept their mistakes and deficiencies and ask candidly what capabilities they and the company will need in the future. As a result of these qualities, they can make progress confidently: their actions are grounded in facts; they are not based on fantasies about their own prowess. The futurist Bob Johansen captures the impact of growth versus fixed mindset leadership behaviors when he says: “the future will reward clarity and punish certainty” (Johansen, 2019, n.p.).

Collins identifies the problem of excessive self-esteem and self-importance in more than two thirds of the underperforming company leaders. These leaders were typically concerned with their reputation for personal greatness, so much so that they often set the company up to fail when their tenure ended. They appeared to be more committed to themselves than their companies and insisted on being the hero in their story. As Collins puts it, “After all, what better testament to your own personal greatness, than that the place falls apart after you leave” (Collins, 2001, n.p.). Dweck associates these behaviors with a fixed mindset and cites as examples ego-centric corporate leaders such as Iacocca (Chrysler), Dunlap (Sunbeam), and Skilling (Enron) (Dweck, 2006).

Fixed mindset leaders have the power to make people worse off, and they feel better about themselves when they do so (Hornstein, 1997). Dweck comments that when bosses become controlling and abusive, they propagate a fixed mindset in the organization. This fixed mindset means that instead of learning, growing, and contributing to the progression of the company, employees begin to be anxious about being judged. Courage and innovation are unable to withstand a company-wide fixed mindset, yet courage and innovation are the very properties required for selling in the fourth era.

In contrast, growth mindset leaders put other people first. This attitude is epitomized by Andrew Carnegie, who said, “I wish to have as my epitaph: ‘here lies a man who was wise enough to bring into his service men who knew more than he’ ” (Carnegie Hall, 2022), and by business leaders such as Anne Mulcahy, who was responsible for the turnaround of Xerox, and Lou Gerstner, who was responsible for the reversal of IBM’s fortunes.

Kiel’s character science research echoes similar findings when contrasting the leadership behaviors of “self-focused” with “virtuoso” chief executives and their respective impact on company performance (Kiel, 2015). These linkages between the research findings of Dweck, Collins, and Kiel, underscore the interplay between mindset and character and give credence to the risks of a fixed versus a growth mindset.

2. **GRIT mindset:** Rising adversity, complexity, and constant change in the business and sales environment will demand increased levels of resilience embodied in a GRIT mindset, an acronym for growth, resiliency, intensity, and tenacity (Stoltz, 2012). The GRIT mindset builds on Dweck’s growth mindset and attempts to illuminate the qualities of individual and organizational performance related to “approaching the world with the tenacity, resilience, and relentlessness to come out ahead, regardless of your advantages or disadvantages in life” (Stoltz & Reed, 2011, p. 59).

Angela Duckworth’s research identifies grit as the primary causal factor in achieving excellence: “What we accomplish in the marathon of life depends tremendously on our grit – our passion, and perseverance for long-term goals” (2016, p. 269). Research indicates that there is a heritability component of grit: one study of 2,321 twin pairs in the UK indicates the heritable

element is around 37 percent (Rimfeld, et al., 2016). However, grit is largely a function of the cultural era in which people are raised and their age (in other words, people get grittier as they age). Duckworth and Stoltz assert that grit can grow and be cultivated: “like every aspect of your psychological character, grit is more plastic than you may think. (2106, p. 89)” They are confident that grit can be learned through interest, practice, purpose, and hope.

At the heart of the GRIT mindset is resilience, which has long been a focal point for sales performance. The importance of resilience is even clearer in the context of prevailing market, economic, social, and political conditions, which drive focus on short-term performance in meeting targets and forecasts and encourage the closing of deals that are unrealistic and demoralizing sales teams that are already reeling from the rapid shift to selling in a hybrid, omnichannel, AI-enabled environment (Chappuis, et al., 2020).

While the importance of GRIT mindset and resilience is often advocated in sales organizations, little is done to teach resilience and build GRIT. Seligman argues business can draw on and apply lessons from the Penn Resiliency Program, which focuses on developing PERMA: positive emotion, engagement, relationships, meaning, and accomplishment – the building blocks of resilience and growth – to create people who can turn their most difficult experiences into stimuli for improved performance (2011).

The GRIT mindset has received substantial attention in academia and business, and yet some researchers are skeptical of the power of GRIT to predict (academic) achievement beyond the extent to which this prediction is mediated by genetic and environmental factors (Rimfeld, et al., 2016). Grover Whitehurst of the Brookings Institution makes an illustrative point in this regard: “Grit is a personality trait, not a skill to be taught. It is highly heritable. We have no validated interventions for teaching it that can be used by schools. And grit is just conscientiousness, about which we know a lot, by another name” (2016, n.p.). Despite these reservations about the extent to which grit can be learned, it is clear that grit, tenacity, and perseverance are high-leverage factors that contribute to success (SRI International, 2018). We envisage that the GRIT mindset will become increasingly important for sales organizations in a VUCA (Volatile, Uncertain, Complex, Ambiguous) world (Baran & Woznyj, 2020).

3. **Customer-Centric Sales Mindset:** Technology and the COVID pandemic in the fourth era of selling are accelerating the importance of sales skillsets and mindsets. At the same time, these phenomena have generated new possibilities for effective selling and customer engagement in a hybrid, omnichannel world (Chung, et al., 2022). A framework for positive and negative sales mindsets, or lived values, has been developed by Dr. Philip Squire in his Doctor of Professional Studies dissertation (Squire, 2009). While there is significant literature and research on mindsets, Dr. Squire's work is most pertinent to our Context Statement and to the profession of selling given the focus of his research on the impact of mindset on sales behaviors and performance.

Dr. Squire's framework for sales mindsets is derived from his doctoral research (2004–2009), which observes the phenomenon of uneven performance in sales teams and that only a small percentage of sales people sell effectively. Squire's work sets out to address the following question: "Why? Why after 1000s of years of practice in the art of buying and selling, and more recently with the benefits technology can potentially bring, are the experiences of buyers still so negative towards sales?" (2021, p. 36).

Squire's research challenges deeply held assumptions that sales performance is primarily linked to sales competence and sales methodology. Instead, Squire puts forward the idea that mindsets are a primary driver of sales behaviors. This insight triggered a paradigm shift in thinking about sales. Squire explains the underlying logic: "fundamentally the behaviors of salespeople are influenced by competencies, as well as mindsets and lived values (mindsets). Having the right values/mindsets would influence the right behaviors. For example, the salesperson who truly held a customer-focused mindset would naturally be inclined to listen carefully to what a customer was saying, would not manipulate the conversation, would ask the right questions, and conduct the right research etc." (2021, p. 58).

Korthagen underscores the importance of alignment between behaviors, competence, values, and mindsets with the application of his onion model, which guides learning and development with the aim of sustaining sales transformation (2023). Korthagen argues that total alignment of our core, our identity, our mission, our beliefs, our competencies, and our behaviors with the environment is necessary to achieve transformational change. He postulates that this alignment

is the result of multi-level learning, which puts the ‘I’ at the center of the learning process and emphasizes that people who go through a process of deep learning change at several levels simultaneously (2009). Each of these levels is represented by Korthagen’s onion model.

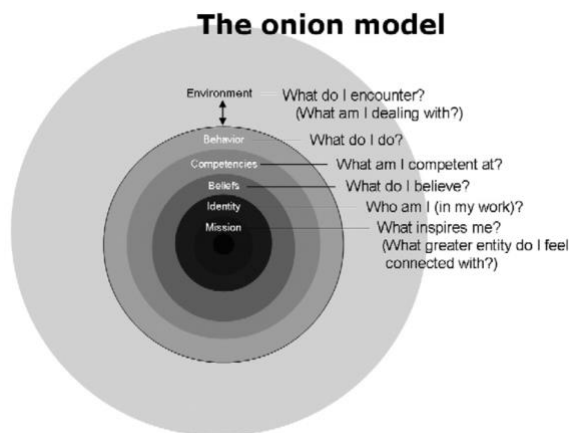


Figure 9: The Onion Model (Korthagen)

Mindset and values aligned with behaviors, coupled with sustained, authentic change and “core reflection” are central to the onion model. As an individual becomes more in touch with their inner levels, these levels begin to influence the outer levels, which helps connect personal mission, identity and beliefs to effective behavior in the outside world (Korthagen & Evelein, 2015). This process enables all the levels of the onion model to be connected and brought into alignment.

Despite the value of the onion model in conceptualizing development, traditional approaches to the development of sales professionals tend to rely on a technical rationality model (Schön, 1992), which considers uniformities in problems and argues all professionals can apply standardized knowledge to solve concrete problems. This rational epistemology can be deemed increasingly ineffective in a complex environment, such as sales, in which, “even when a problem has been constructed, it may escape the categories of applied science because it presents itself as unique or unstable. In order to solve a problem by the application of existing theory or technique, a practitioner must be able to map those categories onto features of the practice situation” (Schön, 1994, p.41). After all, the profession of sales and professional sales development are predicated on interactions with human beings, not with mechanical devices. Sales learning and development programs often focus on the what and the how to sell e.g., a process, a method or technique, and a

competence level. These programs fail to advocate the purpose of change and they do not enable learners to align their mindset, values, beliefs, and behaviors around this purpose.

Squire observes that values and mindsets are a predictor of behavior. Understanding our values helps us make sense of how we will behave in certain situations. These values, beliefs, and mindsets translate into competencies, which encapsulate what we are capable of doing. Current learning and development strategies tend to focus predominantly on competency given that employers are eager to ensure their workforce has the requisite abilities to perform in their role. Competencies relate to the behaviors and actions that are described in sales training methodologies. Furthermore, they are embedded in an environment shaped by the market context in which an organization operates (Squire, 2021). It is essential to recognize that by understanding our values and mindsets, we can better predict how we will act in any given situation. And, in the interface between business-to-business sellers and buyers, customers can employ their understanding of the selling organization's values to anticipate how sellers will act on their behalf.

Customer engagement and selling behaviors grounded in customer-centric mindsets increase the predictability of supplier behavior, which reduces perceived risks and increases the buyer's sense of trust. Customers continuously assess salespeople's value systems throughout the buying process. All the evidence points to the fact that customers choose to work with organizations whose values are aligned to theirs. Recent studies have determined that, on average, 70% of consumer respondents across 25 countries claim they buy from brands they believe reflect their own principles and align with their values (IPSOS, 2021).

Squire observes that customers look beyond the spoken word to obtain a perspective on a person's values. His research identifies significant misalignments between the values customers seek from salespeople and the values they experience in their interactions with salespeople. For this reason, Squire sets out to locate the negative behaviors associated with limiting negative values or mindsets. Squire uses the term "limiting" to convey the idea that these values might not necessarily thwart the sale, although there is a distinct possibility that they could. If a salesperson's training reinforces these limiting values, or they are motivated and incentivized to apply them, such a salesperson will not meet customer expectations and will likely underperform (2021).

Squires' research explores the mindset, or "lived-values," that create negative and, conversely, positive buying experiences. Squires examines the impact of these mindsets on sales performance. There are a number of **negative sales mindsets** that result in undesirable customer experiences and that, in turn, limit sales performance:

- Manipulativeness;
- Supplier centricity;
- Complacency;
- Overt arrogance.

Limiting/negative mind-sets	Drives behaviour that can be seen as being:
1. Manipulative	Pushy, insincere, pressurising, dishonest, glib, annoying
2. Supplier centricity	Reactive, lacking foresight, disinterest, lacking accountability, unstrategic, unknowledgeable
3. Complacency	Egotistical, self-satisfied, inattentive, unconcerned, lazy, unoriginal
4. Overt arrogance	Motivated by self interest, arrogant, individualistic, opinionated, controlling

Figure 10: Limiting/negative sales mindsets (Squire)

Squire investigates why many salespeople continue to exhibit these negative mindsets: "Pressure on the sales function from a variety of sources – customers, management, competitors, and others – has put the salesperson in the uncomfortable position of dealing with complex, unrelenting ethical dilemmas on an almost daily basis. To be sure, salespeople have contributed to the problem by focusing on short-term goals and often placing their own self-interest ahead of the company and the customer" (Squire, et al., 2022, p. 12 - 15). Negative mindsets and lived-values generate a range of risks, which can result in significant reputational, commercial, and legal damage to individuals and organizations. There are multiple examples of corporate scandals that originated from these negative mindsets. The Wells Fargo cross-selling case is one instance that clearly illuminates the risks of negative mindsets and resultant behaviors.

Wells Fargo is the third largest bank in the United States and has assets of \$1.78 trillion (Bankrate.com, 2022). The bank advertises its vision “to satisfy our customers’ financial needs and help them succeed financially” (Wells Fargo, 2022). Moreover, the leadership of the bank espouses a culture of customer-centricity. However, despite these claims, the reputation of the company and its leadership, as well as the bank’s financial performance, has been battered by revelations of sustained fraudulent behavior and criminal undertakings.

In 2013 a Los Angeles Times investigation uncovered for the first time the practices and metrics that placed intense pressure on Wells Fargo bank managers and individual bankers. Employees had to achieve sales against aggressive and even mathematically impossible quotas. One branch manager described the threats that accompanied these quotas: “We were constantly told we would end up working for McDonald’s, if we did not make the sales quotas” (Los Angeles Times, 2013, n.p.). Despite internal and external investigations, these sales practices continued, as reported by The New York Times: “From 2002 to 2016, employees at the bank used fraud to meet impossible sales goals” (New York Times, 2020, n.p.). In addition, a Securities and Exchange Commission report found that Wells Fargo, “in contrast to public statements and disclosures about needs-based selling, implemented a volume-based sales model in which employees were directed, pressured, or caused to sell large volumes of products to existing customers, often with little regard to actual customer need or expected use” (Securities and Exchange Commission, 2020, n.p.).

The consequences of this malpractice have been significant for Wells Fargo. There are ongoing civil and criminal charges against a number of key leaders. The revelations resulted in the resignation of the CEO and over \$7 billion paid in fines and penalties. The bank’s stock-price has lagged behind that of peers since 2016, “due to ongoing reputation issues and unresolved legal matters which have weighed on the bank’s stock price and profitability” (Reuters, 2020, n.p.). The Wells Fargo case illustrates the risks and consequences of incentives that work in opposition to stated cultural values, particularly when they reward employees for achieving a metric without regard to the actions they took to achieve that metric (Graham, et al., 2022). The case highlights the interaction of cultural values/mindsets and norms/behaviors and shows the importance of alignment of values and behaviors. Cultural values/mindsets can be conceptualized as the ideals employees strive to fulfill, while cultural norms characterize the day-to-day practices that reflect these

values/mindsets. Clearly it is not sufficient for companies simply to declare their values. Behaviors and actions must be congruent with stated values and mindsets, and they must be reinforced by formal mechanisms such as incentives, management practices, and governance: “Stated values do not, by themselves, guarantee a successful outcome” (Graham, et al., 2017, p. 31).

In his research, Squire finds that under 10 per cent of salespeople meet customers’ expectations. Drawing insights from transcripts of customer interviews, Squire outlines the positive values and mindsets displayed by the top salespeople who develop trust and meet customers’ expectations (2021). The discovery that only a small proportion of salespeople meet customer expectations is reinforced in other studies, such as by Bain & Co., which concludes: “Most companies assume they’re consistently giving customers what they want. Usually, they’re kidding themselves” (Bain & Co, 2005, p. 1). Bain & Co.’s research highlights a considerable “value delivery gap” in the sense that 80 per cent of companies are convinced they deliver a “superior experience” to their customers, while, according to their customers, only 8 per cent of companies are perceived to deliver on their promises.

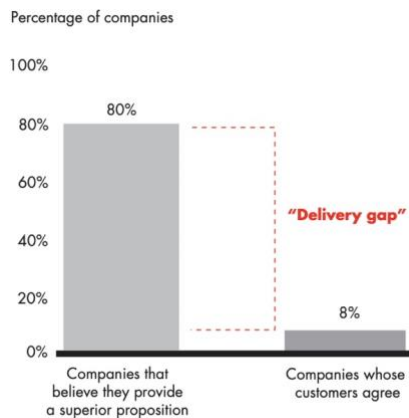


Figure 11: Value Delivery Gap (Bain & Co.)

In contrast with the limiting mindsets, Squire points to a number of **positive sales mindsets** that are displayed by top performing salespeople:

- Tactful audacity;
- Proactive creativity;
- Client centricity;
- Authenticity.

Differentiating/outstanding value	Drives behaviour that can be seen as being:
1. Tactful audacity	Daring, bold, perceptive, understanding, challenging, unconventional, enthusiastic
2. Proactive creativity	Strategic, forward thinking, innovative, creative, reflective, above and beyond
3. Client-centricity	Interested, investigative, knowledgeable, dedicated, passionate, accountable, attentive
4. Authenticity	Honest, credible, unpretentious, sincere, ethical, trustworthy, dependable, unknowledgeable

Figure 12: Enabling/Positive Sales Mindsets (Squire)

Squire's research illustrates that customers seek layers of value that go beyond the product or solution when they make purchasing decisions. They look for a complex amalgam of behaviors from their account executive to deliver on the purchase and realize outcomes. These behaviors include the ability to sustain productive conversations and the agility, leadership, and collaborative skills to leverage resources from across, inside, and outside their organizations. All of these behaviors are underpinned by authenticity (Squire, 2009).

Research on sales mindsets concludes that that "proactive creativity" and "tactful audacity" represent the two differentiating values that are most important for customers and that the majority of salespeople fail to display. The values of "proactive creativity" and "tactful audacity" must be complemented and, in certain cases, preceded by "client centricity," or relevance, and "authenticity" to develop an initial relationship based on trust (Squire, 2009).

These sales mindsets and resulting behaviors can be regarded as mastery of the discipline of sales. This mastery is achieved through practice and through ongoing reflection. Such reflection is guided by the following type of questions: "Am I doing the right things for my customers?"; "What creative ideas can I bring?"; "How can I validate these ideas and, by doing so, am I doing the right thing for my customer and my company?" The salesperson must earn the right to embody the values of tactful audacity and proactive creativity. Unless the customer feels that the salesperson is an individual in whom they can place trust, they will view proactive creativity with suspicion, and

they will regard tactful audacity as arrogance. Therefore, the baseline point of entry to enable positive sales mindsets is to display authenticity and to exhibit behavior that is client centric (Squire, 2021).

Both positive and negative sales mindsets are evident in the selling practices of a global software enterprise. Inside the company this practice came to be known as the “heaven and hell” sales methodology. Sales executives were trained to identify and engage prospective customer senior executives and to use their influence to encourage the non-customer organization to invest in the company’s software solutions. Executives such as the CIO and the CFO were targeted by such practices. In the early stages of deploying this approach, sales executives were equipped with scripts to deliver a consistent message: the sales executives informed the executive-level stakeholders where there were “gaps,” which were highlighted in two presentation slides. The first slide was entitled “hell” and it quantified the outages, or gaps, in the customer’s operating and management systems. The second slide was entitled “heaven” and it quantified the accretive, differential impact for companies who had invested the company’s software solutions. The “heaven” versus “hell” differential impact analysis was conducted by the company’s “value engineering” organization, which studied the impact of company solutions on users and non-users within a vertical industry. This analysis was in most cases highly accurate. Nevertheless, the company’s first attempts at implementing a mechanistic, scripted, process-focused approach to engaging prospective customers failed because the stakeholders experienced company salespeople as exhibiting the negative and limiting mindsets of arrogance, manipulateness, and supplier-centricity. Prospective customer stakeholders reacted with a sense of hostility toward the selling organization because of its presumption to know the customer’s business and how to run it more successfully. As a result of these failings, the software company retained the same “heaven and hell” value analysis but adjusted their sales training to accentuate the positive sales values of “authenticity” and “client centricity”. This approach facilitated the salespeople’s entitlement to be “proactively creative” and “tactfully audacious” in how they engaged customer stakeholders. The key adaptation the company initiated in sales training and practice was to encourage and empower sales executives to be authentic, to act unscripted, and to engage customer stakeholders with confidence and humility. Instead of presenting “heaven and hell” as presumptive facts, sales executives framed their differentiating value proposition as a “hypothesis” to be validated by the customer. The salespeople shifted their thinking from being focused on selling software (supplier-

centric) to a mode of engagement that was aimed at enabling prospective clients to make better, data-driven decisions (client-centric). This shift in sales mindsets, while keeping the data the same, led to a significant increase of approximately 27 per cent in the enterprise software company's sales (Harvard Business Manager, 2016). The case lends validity to a mantra used at The Summit Group: "how you sell matters more than what you sell."

Squire's research demonstrates that over 90 per cent of salespeople are perceived to exhibit the limiting and negative values that lead to distrust. Negative and positive sales mindsets can be plotted against a continuum of trust, as illustrated in Figure 13 below. It is important to recognize that from a customer's perspective, trust is not the same as loyalty, which implies that it is possible for a customer to show loyalty through repeat purchases, but that this loyalty does not mean that the customer trusts the selling organization (Squire, 2021).

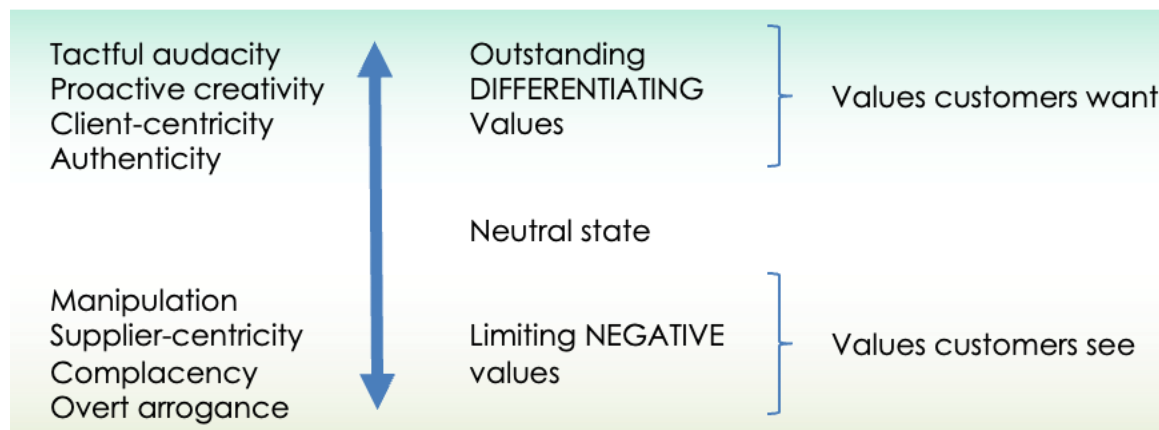


Figure 13: Hierarchy of values - progressive trust in 'brand' (Consalia)

While it is clear that customers want to be challenged (tactful audacity) and want suppliers to be proactive in providing insights and information (proactive creativity), suppliers can engage with customers at this level only when sufficient trust has been established. Trust enables customers to divulge insights about problems they want to solve or opportunities they seek to pursue.

Undertaking a shift in mindset is onerous: an individual's ability to change mindset from within is as difficult as changing an organization's cultural mindset from without (Farnam Street, 2022). Salespeople must be particularly compelling, creative, and audacious to change a procurement

organization from a transactional mindset to a values-based mindset. The same values developed externally to engage and build trust with customers can also apply internally, within the supplier's organization, as salespeople seek to leverage capabilities and resources across the different silos of their company.

Dweck argues that mindsets are inherently mutable: "people can believe that a particular attribute, such as intelligence or personality, is simply fixed, or they can believe that it can be shaped and developed" (Dweck & Yeager, 2019, p. 481-496). Along similar lines, Squire observes that no one is born with a set of values or mindsets; these attributes are developed as a consequence of the social environment in which people grow up. Positive sales mindsets can be regarded as sales disciplines mastery of which is achieved through practice and constant reflection (2021). Values and mindsets develop over time; they have a significant bearing on how we act and behave. At work, and in the sales organization, values are influenced by the behaviors of the sales managers and by the culture of the organizations for which we work (2021).

Factors that hinder the shift to positive mindsets include the company's formal mechanisms such as sales processes and remuneration and incentive systems that encourage short-term thinking and individualistic, egocentric behavior. These factors lead to a silo mentality that makes it difficult for salespeople to leverage capabilities across their company. The effort required to orchestrate the resources of their company is overwhelming. Thus, while many companies establish corporate values, their approach to value stems from an inside-out perspective and there is misalignment between stated values and behavior owing to conflicting metrics, incentives, and manager expectations. The Wells Fargo cross-selling case above provides a compelling illustration of such misalignment. In contrast, Squire suggests taking a client-centric approach to establishing corporate values: such an approach proceeds from the outside-in and enables companies to forge closer, more lucrative, more strategic, and longer-term relationships with their customers.

The misalignment of individual mindsets and values and those of institutions, as reflected in management practices, metrics, and governance, is especially relevant in the context of the prevailing mental health crisis (Mental Health America, 2022) and "great resignation." The misalignment of mindsets can be considered a potential root cause of these problems currently facing people and organizations. Squire regards this misalignment as a key factor in retention: "So, you could have a situation where your core values are at odds with what you are being told to do in

your job. And you can live with that contradiction up to a point, but at some stage, you're going to leave your job because it doesn't feel true to your values" (2021, n.p.).

To gain deeper insights into sales mindsets we interviewed Dr. Squire (2023) to explore the theories that lie at the root of his thinking. We wanted to uncover the primary influencers on the application of mindsets in the domain of sales.

Our exploration of the theoretical underpinnings of sales mindsets unearthed the pioneering work of Howard Gardner (2009), whose work exerted substantial influence on Squire's development of the concept of sales mindsets. Gardner categorizes five distinct mindsets: the disciplinary mind, the respectful mind, the ethical mind, the creative mind, and the synthesizing mind.

The disciplinary mind is characterized by mastery of a specific domain that requires deep knowledge, understanding, and practice. In our book *Relevance* (Hayes & Styrlund, 2014), we give an account of disciplinary mastery that emphasizes the need for professional salespeople to possess a deep familiarity with their domains of activity in order to develop trust and credibility and in order to be better equipped to create compelling solutions that address customer concerns.

The second mindset theorized by Gardner (2009) is the respectful mind. The respectful mind is characterized by empathy and by an appreciation of other people's points of view. In sales, interpersonal understanding and empathic qualities are essential for building a rapport with clients and for earning their trust. A respectful mindset correlates with higher levels of empathy and with consummate listening skills that enable salespeople to address customers' Careabouts™. These interpersonal skills are necessary for salespeople to validate their customers' challenges and are instrumental in their development of bespoke solutions to address these challenges. Our work on the role of empathy in sales is consistent with Dr. Squire's finding that arrogance is the top barrier to enabling salespeople to deliver what customers seek. True co-creation sales relationships are built on empathy, as Dr. Kiel finds in his research on keystone character habits. Dr. Kiel's work on compassion (2014) dovetails with Dr. Squire's findings on arrogance and our own theorization of empathic sales attributes.

The third mindset discussed by Gardner is the ethical mind. The ethical mind focuses on accountability for one's actions and displays deep concern with the implications of one's choices. Gardner's concept of the ethical mind is aligned with Dr. Kiel's character habit of responsibility, which enables the development of long-term customer relationships and a reputation that is built over time and through accretion. Gardner's concept of the creative mind encompasses thinking beyond the norm. The creative mind seeks innovative solutions, and this style of expansive thought will be essential in a future characterized by machine selling. Sales professionals who exhibit a creative mindset will be able to engage with customers and solve their problems far more efficiently than their competitors. The final mind type theorized by Gardner is the synthesizing mind, which is adept at integrating information from a wide variety of sources and articulating the insights derived from its expansive research in a cogent and persuasive manner. The synthetic thinking analyzed by Gardner can be conceptualized as a particularly efficient mode of sense-making. In our firm, we understand the skill of synthesis as an ability to assume the role of the Great Explainer. Such a sales persona has an ability to make connections across disparate sources of information, to narrow the focus to the essential elements, and to articulate a distinctive and relevant value proposition. In summary, Gardner's work (2009) underpins the ethos that we outline in our context statement: "who you are matters as much as what you do" and "the future of sales is a thinking game."

The second major influence on Dr. Squire's construct of mindsets is the work of Napolitano (2013), who argues that customer-supplier partnering is an essential strategy for building long-term relationships between companies and their customers. Napolitano explains that this approach to partnerships involves collaborative work with customers to identify their needs and create solutions that address those needs. Napolitano's research uncovers the need for increased levels of customer loyalty, communication, and better alignment of business objectives.

According to Napolitano, customer-supplier partnering will entail a shift in mindset among sales professionals as the agents charged with implementing this strategy. As opposed to viewing customers in transactional terms, salespeople need to adopt a more consultative approach predicated on building trusting relationships and on providing distinctive value. Napolitano's work underscores the important role of mindsets in sales and demonstrates the instrumental nature of

mindsets on salespeople's interactions with their customers (2013).

A shift in mindset does not imply simply changing the way salespeople think; it involves a deeper change in behaviors and processes. Napolitano argues that sales professionals need to be trained in collaborative problem-solving and that they need to prioritize customer satisfaction over short-term revenue goals. Napolitano observes that these organizational changes can be encouraged through the development of metrics to measure the success of companies' customer-supplier partnering initiatives and to reward sales professionals who demonstrate this higher-order consultative mindset (2013).

The third major influence on Dr. Squire's work is the research of Maria Antonietta Raimondo (2000) that assesses methodologies to measure trust, such as surveys, experiments, and case studies. The implications of her work with regard to sales mindsets are significant.

Raimondo suggests sales professionals must understand the criticality of building trust with their customers if they are to establish long-term relationships and increase customer loyalty. A mindset of transparency, honesty, and fairness is essential in building trust with customers. According to Raimondo, sales professionals must have a heightened awareness of the various components of trust, including its cognitive and emotional aspects, in order to tailor their communication and relational styles (2000). A consultative mindset that focuses on building relationships and providing value-added services is more likely to build trust than a transactional mindset that prioritizes short-term revenue goals.

The fourth key influence is the work of Saxe and Weitz (1982), who present a scale to gauge the degree to which salespeople are customer oriented. The scale is composed of eight elements that measure various aspects of customer orientation such as empathy, adaptability, and the ability to solve problems. The SOCO scale has a multitude of implications for our understanding of the role of mindsets in sales. Saxe and Weitz advocate the necessity of a customer-oriented mindset among sales professionals, so they are better positioned to understand their role in helping customers solve problems and achieve their goals. A customer-oriented mindset goes against the tendency among sales professionals to envisage their role in terms of selling products and services. The mindset shift advocated by Saxe and Weitz necessitates moving

from a transactional approach to a more consultative approach. The SOCO scale can help organizations to develop metrics to track the success of their sales teams by measuring the customer-orientation of salespeople and identifying areas for improvement in the discipline of customer-orientation. Furthermore, the SOCO scale can help to determine the characteristics of successful salespeople in order to improve recruitment and training processes by cultivating the aptitude of individuals who possess such fluencies. Saxe and Weitz contend that sales professionals who are empathetic, adaptable, and adept at problem-solving are more likely to be customer-oriented and will achieve greater success in building long-term relationships with customers (1982).

A final influence on Dr. Squire's work is F. Selnes' research on trust and satisfaction in sales. In "Antecedents and Consequences of Trust and Satisfaction in Buyer-Seller Relationships" (1998), Selnes provides a conceptual framework outlining the origins and implications of trust and satisfaction. The antecedents of trust and satisfaction include such factors as communication, perceived quality, and the reputation of the seller. The consequences of trust and satisfaction include loyalty, commitment, and enhancement of the seller's reputation as customers recommend the seller in their own networks. Selnes emphasizes the importance of building trust and satisfaction with customers in establishing long-term relationships and increasing customer loyalty.

By understanding the enablers of trust, sales professionals can tailor their approach to build higher levels of satisfaction with customers more effectively. It is clear that the consequences of trust and satisfaction, which can enhance customers' loyalty and the reputation of the sales organization, have significant implications for the success of a company and its brand. Selnes argues that sales professionals must adopt a mindset characterized by transparency, honesty, and fairness in order to build trust with customers and establish long-term relationships (1998). Moreover, it is critical for salespeople to understand the core factors that influence trust and satisfaction in buyer-seller relationships so that they are well equipped to customize their approach and thus engender loyalty among their customers and cultivate a positive reputation.

The topic of sales mindsets has long suffered from a relative dearth of significant research. Colin and Brown (2023) have gone some way in remedying this lack of sustained attention to the topic

of sales mindsets. *The Unsold Mindset* explores the psychological aspects of sales and their impact on sales success. The study argues for the importance of cultivating a positive and proactive mindset to improve sales performance and customer relationships. Colin and Brown's work has three main tenets: first, their study identifies what the authors term the unsold mindset, which encompasses self-doubt, fear of rejection, and negative self-talk; second, the authors offer practical techniques for cultivating a positive sales mindset that builds on the development of a growth mindset, resilience, and optimism; third, they analyze the process of overcoming challenges and adapting to change by navigating the vicissitudes of a turbulent sales landscape, embracing change, learning from failure, and developing adaptability.

Mindset research suggests that companies achieve greater sales performance by looking beyond traditional techniques, skills, and processes. The right sales behaviors are generated only if they are integrated into a sales organization's belief system, cultural values, and mindsets. The strength of these beliefs determines employees' ability to dedicate time to achieving this change. Furthermore, we suggest that personal transformation must precede organizational transformation. Consalia, a partner of The Summit Group, provides tools, guidance, and coaching to enable salespeople, managers, and leaders to develop positive, differentiating sales mindsets. This personal journey may begin with a personal or 360^o assessment of sales mindsets. The most legitimate assessments are those in which "customers assess the salesperson/team on lived values/mindsets" (Consalia, 2022). Squire regards critical reflection as a core competence for salespeople to develop positive sales mindsets and behaviors. According to Squire, it is "absolutely key in this fast-changing world in which we live" (2021, n.p.).

In conclusion, Squire's sales mindsets research builds on growth and GRIT mindsets and demonstrates that a strong client-centric value system can be cultivated. Such a value system, congruent with character, is required to support the development and performance of the sales organization. Squire draws on existing lines of scholarly inquiry (Graham, et al., 2017) in his contention that the salesperson's support infrastructure, management, methods, processes, and the company's value system must be aligned with positive sales mindsets to enable sustained adoption. The role of management is to remove the constraints that often result in limiting mindsets and values. Management must align the formal mechanisms that enable positive mindsets and values, which in turn empower the salesforce to engage customers more effectively. The alignment

of mindsets can contribute to salespeople rising to the top levels of performance, while enabling congruence with character, personal beliefs, and organizational values.

2.4. Application of lenses to reflect on public works

We apply the lenses of character science and mindsets to reflect on our public works. Our analysis examines the intersection of character habits and sales mindsets and identifies the keystone sales behaviors – the higher-order and higher-return fluencies – that will define virtuoso salespeople of the future. Given the unprecedented nature of industry change, the sales profession cannot rely on traditional ways of thinking, organizing, and learning. Character science and mindsets reveal new possibilities for how the sale profession can adapt to an increasingly volatile, uncertain, complex, and ambiguous environment.

This paradigm shift can be characterized as an ongoing transformation from a Newtonian/Cartesian worldview, which can be conceptualized as a kind of clockwork, in which the world is fundamentally objective, rational, linear, deterministic, and orderly. This Newtonian/Cartesian worldview has given way to one that is described by social theorists as “postnormal” (Sardar, 2010) and “liquid” (Bauman, 2000). In this “runaway world” (Giddens, 2003) we are at a transitional moment in which one era is disappearing and a new one has not yet emerged. This moment of flux is thus marked by uncertainty.

The challenge presented by these fundamental changes is exacerbated by the human desire for order, control, and certainty. Neuroscientists argue that the brain does not simply prefer certainty over ambiguity but that the brain actually craves this certainty. We have a “certainty bias,” which means that even if we are not necessarily right, we want to feel right (Burton, 2008). Ways of organizing education and industry continue to reflect our reductive “machine thinking,” with its stress on certainty, order, prediction, and control (Montuori, 2017). The risks and uncertainties of change are accentuating the division between fundamentalists, who cling to crumbling traditions, and cosmopolitans, who display tolerance and embrace open-mindedness, diversity, and cultural complexity.

The possibility of certainty is being replaced by the lived experience of uncertainty. In a world that is perceived as chaotic, the quest for new ways of making sense of our lives need not come as a surprise. Philosopher Alan Watts' *The Wisdom of Insecurity* (1951) and Buddhist teacher Pema Chödrön's *Comfortable with Uncertainty* represent an intensifying trend to find ways to live with uncertainty (2003). The need for meaning and order is found not just in spiritual texts and contexts, it is also found in the practical world of management. Business texts have drawn on chaos and complexity theories for several decades. Brafman and Pollack's *The Chaos Imperative* (2013), Visa founder Dee Hock's *Birth of the Chaordic Age* (2000), management guru Tom Peters' *Thriving on Chaos* (1988) exemplify this trend. However, this work often seems to run aground on the traditional ways of thinking, organizing, and learning that still inform our practices.

The two lenses of character and mindsets reveal the need for discernment and tuned intuition. Reflecting on our value/strategic selling public works over the past 15 years the concept of intuition is gaining ever greater traction and credibility in the workplace. We have observed in our client base that transformative leaders rely on intuition. Transformative leaders do not attempt to address complex problems in a fashion that might be described as entirely rational. Senge argues that leaders "rely on hunches, recognize patterns, and draw intuitive analogies and parallels to other seemingly disparate situations". This intuitive process occurs spontaneously in personal mastery: "People with high levels of personal mastery do not set out to integrate reason and intuition. Rather, they achieve it naturally -- as a by-product of their commitment to use all resources at their disposal. They cannot afford to choose between reason and intuition, or head and heart, any more than they would choose to walk with one leg or see with one eye" (1990, p. 168).

Senge observes the role played by this combination of intuition and reason in success in the modern workplace. He cites the example of how the use of two eyes gives us depth perception and hypothesizes that reason and intuition work harmoniously in a similar fashion that enables us to achieve our "potential intelligence".

One of the core fluencies that distinguishes transformational leaders is an ability to perceive a multitude of aspects to a given problem and to perceive the problem as a whole rather than focusing on its constituent parts. An individual's ability to transcend a self-interested perspective and to view the entire context of a situation or interaction is a critical ingredient in the development

of discernment and tuned intuition. Discernment is the result of disciplined recognition of patterns and of the quest to understand the factors that give rise to these patterns. Senge (1990) argues that personal mastery is predicated on our ability to overcome a deluded belief in our separateness and to develop a sense of connection with others. He shares Einstein's conviction that mastery is achieved through the exercise of compassion in our connections with others. Our connectedness with others is built on awareness of and concern for others. In order to develop a known and felt sense of our connectedness we must be appreciate the extent to which people are influenced by one another.

According to Senge (1990), a greater sense of connectedness leads, in turn, to a commitment to a broader and more inclusive vision. Connection and inclusion enable individuals to benefit from the synergies of the collective: "The sense of 'connectedness' and compassion characteristic of individuals with high levels of personal mastery naturally leads to a broader vision. Without it, all the subconscious visualizing in the world is deeply self-centered – simply a way to get what I want. Individuals committed to vision beyond their self-interest find they have energy not available when pursuing narrower goals" (Walker, 1999, p. 171).

By promoting personal mastery, compassionate commitment to the whole plays a significant role in personal and organizational learning. This compassion aids individuals in finding a balance between their commitment to themselves and to the organization. They are thus able to capitalize on opportunities for personal and professional fulfillment and contribute to organizational success and social progress.

In summary, Senge conceives personal mastery as a lifelong process of learning that complements the learning organization. Individuals pursue their personal goals by drawing on the creative tensions between personal vision and current reality. Supported by some form of meditative practice, individuals achieve personal mastery through a heightened rapport with the subconscious; they draw successfully on an innate propensity to integrate intuition with reason. Through compassion, a sense of connectedness with others elevates personal vision above self-interest and toward the embrace of others. The successful implementation of these steps yields unprecedented energies (Walker, 1999).

The concept of personal mastery, which we see as integral to understanding our public works, is also elaborated on by Covey (1989) in the discussion of “Seven Habits of Highly Effective People.” Covey describes these habits as “internalized principles and patterns of behavior” that lie at “the intersection of knowledge, skill and desire”. There is a strong link between Covey’s seven habits and the concept of personal mastery: “The Seven Habits are habits of effectiveness.... become the basis of a person’s character, creating an empowering center of correct maps from which an individual can effectively solve problems, maximize opportunities, and continually learn and integrate other principles in an upward spiral of growth” (2020, p. 47, 52).

We argue that the two lenses of character science and mindsets will reveal new and essential ways of thinking, learning, and engaging customers in the fourth era of selling. These two lenses have enabled an expanded, integrated view of both vertical and horizontal learning to develop higher-order creativity, empathy, and collaboration, which, we propose, are elemental ingredients for the future of professional selling.

3. Public Works Viewed Through the Lenses

Our public works have been developed in the context of the environment and market conditions in which we operate. These works have been influenced by our contextual experiences, biases, and knowledge. The process of drafting this context statement has necessitated critical reflection on our practices, which has provided a space to challenge our thinking and critique our prior assumptions.

The lens of character habits and sales mindsets, when applied to the context of the current era of selling and the complex environment in which we operate, has enabled us to view our practice differently and to make new connections. Already in our consulting practice we are beginning to adjust our focus, priority, and approach in the context of client conversations. We now integrate the dimension of vertical development and seek to expand new client capabilities beyond the mechanistic processes and sales/account management skills that prevailed in the horizontal development practices we have outlined in our past public works.

3.1. Public Works Core Themes

Core themes are present in our professional work and consultancy practice and are evidenced in our public works. These themes stem from our personal and professional values of trust, transparency, collaboration, learning, and growth. They derive, moreover, from the practices that have served us and our consulting firm well in the past. They are encapsulated in the mission and vision of our consultancy. Embodied in our team, they guide how we engage, communicate, and collaborate internally and externally with clients.

The interrogation of our practice in this context statement is predicated on our recognition that the skills and attributes that have led to our success thus far will be insufficient to meet our future aims (Goldsmith, 2007). We have capitalized on this opportunity to challenge our assumptions regarding practices that have worked in the past by applying the wisdom of the Sankofa bird (Carter. G. Woodson Center, 2022) to reflect on what we can continue doing, start doing, do differently, and stop doing. We envisage that the themes and the practices embedded in our past works are largely transferable in the context of the emerging sales and business ecosystem. But at the same time, these former practices are emblematic of our past works and do not necessarily provide a blueprint

for our future growth. Therefore, adaptation is required, as well as new thinking to guide the future practice and profession of selling.

We are able to delineate seven themes embodied in our professional practice and public works:

1. **Relevance:** Our consulting business aims to develop mindsets, skillsets, and capabilities that enable personal and business relevance. In the context of selling, we regard relevance as the foundation of a strategic, value-based approach to sales, and we view relevance as more significant than intelligence. Clients are unconcerned by intelligence; they attach greater importance to alignment and whether our knowledge and actions can have an impact on what matters to them (Styrlund & Hayes, 2014).
2. **Business empathy:** Empathy is the foundation for relevance. It is a key enabler of trust, creativity, and innovation. The Summit Group utilizes design thinking-based principles, frameworks, and tools that equip salespeople with structural curiosity and with the ability to adopt the perspective of their customers. The practice of business empathy provides salespeople and organizations with new insights and perspectives that challenge embedded assumptions and help to elucidate the needs of customers and business partners. Business empathy requires deep listening and a suspension of the skills typically prized under the rubric of problem-solving. Business empathy, while essential, is all too often lacking.
3. **Growth mindset:** Lifelong learning and development can be promoted through the adoption of a growth mindset (Dweck, 2006). We seek to create psychologically safe learning environments, learning journeys, and guided reflective practice that motivate movement from comfort to learning zones. These learning experiences challenge individuals and organizations to engage in a continuous process of development with a view to upgrading their skills and qualities. Our practice has focused largely on horizontal development: it has aimed to equip salespeople and organizations with effective, differentiating customer engagement and sales processes. For example, our core public works include the development of the Strategic Account Management Association's (SAMA) Certified Strategic Account Manager (CSAM) curriculum, which runs over 9–18 months as an immersive learning experience leading to industry recognized certification and is aligned with SAMA's process (2022). An outcome of our critical reflection through the doctoral process is to enhance our training by increasing our focus on vertical development as a core practice area. Today the SAMA CSAM curricula leads to incremental improvements through rigor, process, principles, and tools. Enriching the learning journey through integration

of vertical development can result in a shift in learners' perspectives and values, their sense of being in the world, and opens up the possibility of a step change in performance by increasing the sales person's capacity to learn and grow.

4. **Value co-creation:** The Summit Group was one of the early innovators in applied value co-creation. Value co-creation theories abound (a Google "value co-creation" search generates 706 million results in under 0.5 seconds), yet few organizations have been successful at embedding value co-creation as a core capability in how they engage with their customers in innovation, value creation, and growth. Prahalad and Ramaswamy define value co-creation as "the joint creation of value by the company and the customers, allowing the customers to co-construct the service experience to suit their context" (2004, p. 5 - 14). Our public works are underpinned by an emphasis on creating collaborative value, a practice that continues to contribute to co-creation between leading industry players and that results in new products, new services, and business model innovation.
5. **Personal transformation precedes organizational transformation:** Some companies make significant investments in software and tools, such as CRM (Customer Relationship Management) systems. Their investment in such tools entails the need to train their staff on how to use the tool. These companies make such investments in the belief that they will transform how they engage and create value with customers and that they will ultimately enable them to increase their revenue. However, investments in such software do not bring about fundamental change in sales people's behavior or in the business's operations. They can give the illusion of transformation in the absence of any meaningful change, which may explain why up to 69 per cent of CRM projects fail (Harvard Business Review, 2018). Our guidance, based on numerous engagements, is that "thought-ware" (how sale teams think and behave) should precede "software." In a commoditized world, the salesperson is as, if not more, important than the product or service they sell.
6. **Pragmatism:** The Summit Group eschews the blind application of abstract theory as we develop our understanding of clients' unique, specific, and time-bounded needs. We collaborate with clients on strategy, tactics, and learning that can be applied to the sales professional's reality. The transfer of these collaborative strategies and techniques to sales professionals' working practice enhances the competencies that create customer value. This practice amplifies the engagement and collaboration of sales teams and improves company results.

7. **Authentic change, sustained results:** Ultimately clients seek to transform their practices, accelerate change, and deliver sustained results. In contrast to prescriptive, mechanistic recommendations, our guidance emphasizes authenticity, which we argue is essential to trust, commitment, and sustaining change. The key to being authentic is to map our inner self to our outer self. The journey to relevance, transformation, and sustained results is built on genuine understanding of our authentic self (Styrlund & Hayes, 2014).

We looked at our Public Works from two perspectives (Figure 14 below):

- First, from a go-to-market capabilities continuum, grounded in the notion of being relevant to driving organizational and culture change;
- Second, from a chronological perspective that encompasses our public works over a timeline that spans 2005 through 2022.

This conceptualization of our Public Works with the aid of a timeline illustrates the ongoing transformation of our practice. Our go-to-market capabilities continuum demonstrates a shift from a foundation of relevance to strategic/value selling, co-creation, and ultimately to customer-centric organization transformation. These go-to-market capability areas are interlinked, and each is built on the preceding stage:

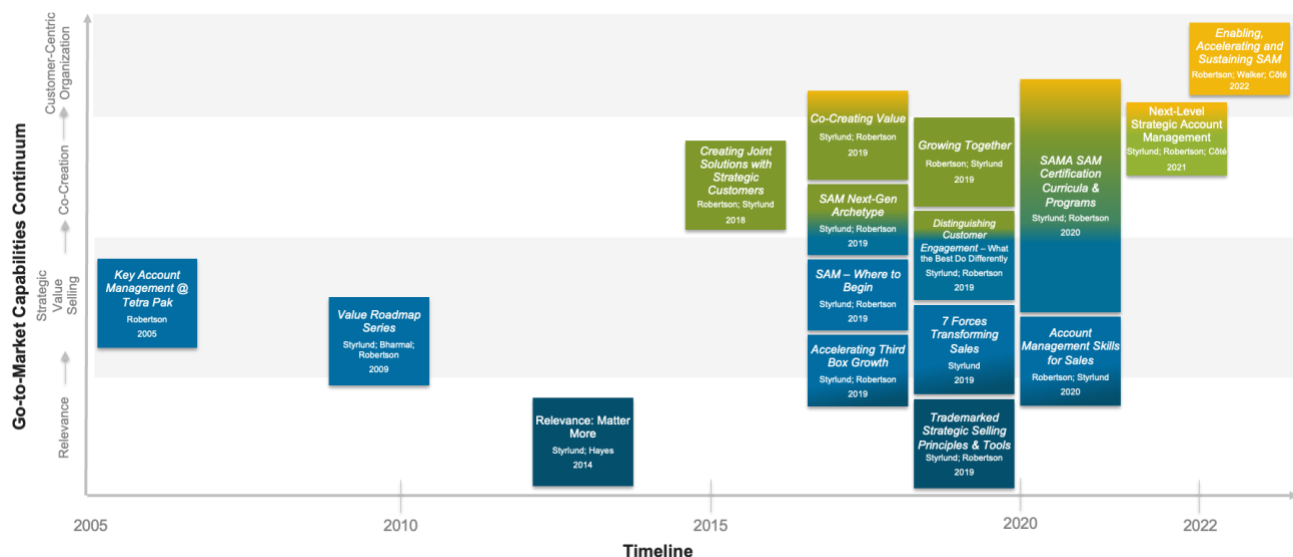


Figure 14: Public Works Timeline Mapped to a Go-to-Market Capabilities Continuum (Styrlund & Robertson)

- **Relevance:** As we mapped our public works, which we submitted as a part of the doctoral process, we observed that the theme of relevance is the foundation of our work. This concept is elucidated in Hayes and Styrlund's book on relevance (2014) and in The Summit Group's trademarked design thinking-based principles and tools. These principles and tools are the intellectual property that we use in our business practice. The concept and practice of relevance provides the philosophical structure, principles, and tools to promote organizational and personal relevance, and underpins all our subsequent works.
- The next level of our public works focuses on **strategic value selling** enabled by horizontal learning. The expertise of our firm and consulting team in strategic value selling has enhanced our clients' performance relative to market and has earned our clients awards in recognition of their effectiveness in selling, engaging with, and creating value with their customers. Our **strategic value selling** Public Works represent an anthology that has shaped how leading sales organizations engage customers, create value, differentiate, and grow their business. Building on the theme of relevance, these works encapsulate strategic roadmaps, customer engagement processes, curricula, and learning programs that enable enterprise-wide, strategic sales and account management capabilities. While they have proven to be highly effective in empowering clients to achieve and exceed sales goals, we question if these artifacts of lateral learning and organization development will, in themselves, be sufficient to enable and sustain sales performance in future.
- Over the past two decades we have invested significant efforts in developing clients' **co-creation** capabilities. While this selling strategy and approach is not new to us, it builds on the underlying pillars of relevance and strategic value selling. **Co-creating business value** describes the cluster of Public Works at the pinnacle of the practice of strategic value selling.

This visual depiction of our public works encompasses our fortuitous meeting in a conference room in south Sweden in 2005. This event, as shown in Figure 14, marks the beginning of our journey to cocreate our body of work, which still continues today, and illustrates a retrospective of our providential personal relationship.

The shape of the curve of the components of our public works indicates that we are on an upward trajectory toward co-creation. We are now focused on enabling customer-centric organizational change, and we will continue to create opportunities for further organizational development in the future.

The visualization of our Public Works (Figure 14 above) illustrates that we have been what we term both the *makers* and the *mirrors* of this content. In some cases, we have created the content, and, in many cases, we have mirrored what our customers have been telling us. Our firm has the benefit of working with highly motivated and skilled individuals. We have drawn significant benefits from working with these individuals, listening to their insights, and subsequently codifying their thinking. To illustrate the concept of *mirroring*, Phil speaks of one of the greatest days of his life, when he met his hero Bob Dylan. During the thirty-four minutes Phil spent with Dylan he asked the musician how he was able to write the transformative lyrics that no one before him had been able to. Dylan looked at Phil and said simply, “I just wrote down what I heard people thinking” (2014). Dylan’s response exemplifies our practice of mirroring our clients’ practice: we ask, listen, and, in turn, capture our clients’ thoughts.

- These Public Works provide the processes, principles, tools, and orchestration that enable organizations and ecosystems to address mutually prioritized and meaningful challenges. Our research, coupled with our critical reflection as part of the doctoral process, reveals:
 - Business value co-creation will be the core of the sales role in future (Robertson & Cote, 2021).
 - Artificial intelligence, machine learning, and digital technologies will replace the traditional sales functions of configuring, presenting, and contracting products and services. Salespeople will no longer manage the order-to-cash and inventory processes, nor will they be tasked with responding to customer queries (Gartner, 2021).
 - Industry changes have accelerated and become more profound: the increasingly complex nature of opportunities, problems, and challenges facing clients and their customers, which are the focus of co-creation strategies, can no longer be addressed with the common leadership approaches and scientific management simplifications that have worked in the

conventional sales context, which has been characterized by orderly and controlled buy-sell interactions (Snowden & Boone, 2007).

- Co-creation, by definition, demands collaboration and teamwork between organizations and across value networks. Individual contributor sales people, and even cross-function account teams, are unlikely to have the expertise and resources to investigate minimum viable solutions and create experimental prototypes of them in a safe-to-fail environment. From an organizational perspective, unrestricted co-creation requires empowering leadership styles, agile methodologies, transdisciplinary thinking, and matrix-working. These ways of working are different from most sales organizations' command-and-control, planned, process-driven operating environment, with its focus on efficiency, consistency, and predictability.
- As co-creation requires creativity and collaboration, individuals become more important than prescriptive processes. Co-creation therefore requires customer-centric, trust-based collaboration between individuals and organizations. This need for trust reveals the essential role of character, mindsets, and transformative sales fluencies as the underpinning catalysts for collaboration across value networks.
- Reliance on horizontal development to build co-creation capabilities is inherently risky. Thus, there is a need to invest in vertical development of transformative-level fluencies, that is, the human, higher-level thinking capabilities essential to co-creation.

The process of mapping our Public Works (Figure 14) reveals the domains in which our past professional activity is concentrated and illuminates our progression toward **customer-centric organization transformation**. This space is dominated by large integrated management, change, and strategy consulting practices, such as McKinsey, BCG, Bain, and EY, and will require continued investment in vertical development consultant capabilities within our firm. Visualizing our public works in this way reveals an opportunity to intensify our focus on sustained organization-wide sales transformation. We recognize, with hindsight, that this sustained enterprise transformation focus has been lacking in many of our client engagements.

As we critically reflect on our Public Works over time and across the go-to-market capabilities continuum we consider the following questions:

- Why did our Public Works take the shape that they did?
- How did our lenses of character science and mindsets inform our client engagements, consulting practice, and Public Works?
- Viewing our Public Works through the lenses of character science and mindsets and interrogating them in the context of the fourth era of selling, what would we do differently now?

3.2. Public Works: Relevance - Matter More and Trademarks

Phil recounts a conversation with his father, then in his mid-80s:

My father, Reuben Styrlund was the archetypal Minnesotan full-blooded Swede. He was a good man, and a loyal man. He survived the Great Depression. He was among the second wave of reinforcements to land on the beaches of France as part of the Normandy Invasion, fighting in battles that paved the way to the liberation of France and the final invasion of Germany in World War II. He deeply loved and was married to my mother, Mae Styrlund, for over sixty years. As he looked back over his long and significant life, my father said something that struck me to my very core. "It's not dying that scares me, it's not mattering anymore" (2014).

That moment galvanized Phil's journey to explore how to matter more to others. This desire to matter encompassed the exploration of personal, business, and brand relevance. As we survey the unpredictable and volatile global business landscape, relevance appears to be the most coveted and yet elusive prize. In world characterized by an absence of stability, security can be achieved by developing relevance for clients. We argue that relevance matters more than intelligence. As intelligence has become more readily available through its delivery by a myriad of technologies, relevance remains invaluable.

Reuben Styrlund's passion to matter more planted a seed that we could not ignore. The conversation has expanded to a circle of our clients, colleagues, and friends. Gradually, it dawned on us that our fascination with mattering more in fact bore relevance to a broader range of people. We realized that we needed to delve more deeply into what it meant to matter more in our own lives, and in the lives of others. This project was shaped by that realization.

Our work and consulting practice is fashioned, furthermore, by the conviction that our ability to have an impact on others is facilitated by relevance. Such relevance does not equate to an exercise in self-aggrandizement; instead, it means enhancing our importance for others. Our desire to be relevant is not unique. It is shared widely and implies a recognition of the innate wisdom in others. We live in a time of change characterized by economic, social, and political turmoil. In the business world, the promises of the past—a stable job, a clear career path, a comfortable retirement—are increasingly elusive (Hayes & Styrlund, 2014).

The Oxford English Dictionary defines "relevance" as "the state of being closely connected or appropriate to the matter in hand" (2022). To be relevant is thus to be important, but the term implies more than simple importance. Trivial workplace activities, such as appointments, meetings, and e-mails that intrude on our daily lives can easily appear important, at least momentarily. In order for importance to attain the status of relevance, it must be connected to a larger scheme. In the business world, to be relevant means being an integral part of the economy and of the future. It means being the kind of person on whom others depend, whether for leadership, expertise, or emotional support. We have codified the four key dynamics of lifetime relevance:

Authenticity

Relevance begins with the journey inward to understand the individual authentic self. The maxim "know thyself" is a timeless aphorism; understanding our strengths and weaknesses with clarity continues to be as vital to living a meaningful life today as it has been since antiquity. Only by digging deep down to the core of our true self can we come to a place of inner certainty. Our underlying values and priorities are our personal navigational stars on life's journey; they are essential tools for charting a life course that embraces what matters most to us.

Tom Hayes describes how the process of revealing the authentic self can be likened to sculpture and to the labor by which the sculptor reveals the sculpture within the stone (2014). Michelangelo's masterpiece *David* languished within a colossal marble block from the quarries of Carrara for 25 years before Michelangelo was awarded the commission to carve what has become one of the most recognized works of Renaissance sculpture. When asked how he made his statue, Michelangelo is reported to have said that he chipped away the stone to reveal the David within. Chipping away that which is extraneous to our true self is more difficult than Michelangelo's

reported statement about sculpture. Laurels are difficult to relinquish, even when they do not reflect our true selves and deepest principles. We are vulnerable to the seduction of popular recognition, advanced degrees, and imposing job titles. The dazzle of accumulated status gives an impression of worldly accomplishments, but the process can actually mask the work of art within. We tell ourselves that accomplishments such as earning a degree, serving on a board, or adding to our collection of information will make us feel more impressive, prestigious, and relevant. The truth is that a form of spiritual minimalism allows us to be uncluttered and available in our thinking and spirit.

However, we cannot ignore the forces of commoditization, nor can we live a relevant life in an assumed identity. While tempting, it is dangerous to embrace an inaccurate sense of our own importance. It is only by accepting and embracing the real self that we first begin to have an identity of our own. The litmus test is simple. It requires interrogating ourselves as to whether we have become the person our childhood self would revere.

In order to achieve wisdom, we need to concentrate less on what we know and have and more on who we are. This belief in identity led us to the work on character science. It is when we chisel away the distractions and compulsive trappings that we come face to face with our authentic self. The key to being authentic is to know oneself, to understand one's innate skills, and to map that unique inner self to one's outer self. It involves asking whether the gifts that are within us are being translated to the gifts that we are bringing to others. Like our biological makeup, our unique self can create a distinctive relevance, which is the ultimate safeguard against becoming a commodity. Many individuals are adept at doing what we do for a living, but we are not profiting from our core gifts in our work. Authenticity does not involve adeptness. It involves being aligned with one's encoding (Hayes & Styrlund, 2014).

Mastery

In our critical reflections on relevance, we have found that the movement from authenticity to mastery, and subsequently from empathy to action is sequential in nature. These different strengths cannot be developed independently in a non-sequential fashion; we are unable to develop our signature strengths first, put them into action, and subsequently contemplate authenticity at a future time. One cannot dedicate oneself to mastering signature strengths until one identifies those strengths by exploring one's authentic core. As we reflect on our lives, identifying our signature

strengths is essential in order to determine the roles and actions we choose. Once we discover our signature strengths, the next step is to develop mastery of them.

Natural aptitudes for, say, speed, persuasion, or musical composition are exceptionally helpful. However, aptitude alone is insufficient. The natural runner who never conditions the body or builds endurance will not win a marathon by relying on raw talent. The skills of charisma and persuasion will not prevail in a courtroom without a thorough understanding of the rules of law and experience with jury dynamics. Without the practice of musical techniques, raw musical talent will not unfold into soul-stirring sound. Gifts, once identified, must be developed; and this process requires discipline and dedication. Mastery means more than merely engaging in the enjoyable aspects of our talents. True mastery requires skill in every aspect of our gifts. In order to excel in business and sales, we have to develop mastery over the mundane necessities: understanding balance sheets, time sheets, income statements, and business projections. Mastery involves excelling at these basic activities. In the quest for relevance, we must understand the wider framework in which we are operating in order to excel at what we do. Mastery can lead to an exponential increase in relevance. It can lead to step changes in how we use our well-honed skills to distinguish ourselves. We see the word “mastery” as an expression of giftedness. It implies a command of authentic skills and the judgment to anticipate outcomes based on past lessons (Hayes & Styrlund, 2014).

Empathy

Empathy is a crucial part of the process of making the gifts we have developed relevant to others. It is a key ingredient in building relationships, engaging with colleagues, and presenting professional services in a way that enhances our relevance for those with whom we interact.

An empathic attitude toward our colleagues, clients, and their customers can be cultivated. Taking an interest in these groups is a skill that can be learned. We can enhance empathy by looking for common ground and seeking to comprehend others. Elevating our practice of empathy in our personal and business lives is a difficult task, but it is essential. Until we fully comprehend that life is not about us, it is not fully lived. Our value in life is determined by our relevance to others.

The work of Marshall Ganz has informed our perspectives on empathy and has shaped our thinking on the application of grassroots, societal change to the business of sales. Ganz’s three-piece public

narrative model—“now” to create urgency, “us” to activate community, and “self” to guide individual action for change (2009)—feeds into our conception of empathy as a kind of docking station of relevance with a three-step path signified by “them,” “you,” and “do.” The first step is to focus on “them”: we must interrogate what our friends, colleagues, or clients care about. The second step is to situate the discussion in the second person with “you”: we must reflect on what we can bring to their concerns. The third and final step involves action encapsulated in the verb “do”: at this stage we define the actions we can take to be a positive force and achieve an impact that addresses the concerns of the others within our scope. Focusing on being interested allows us to connect with those who need what we have to offer. The ability to assume someone else’s perspective, to understand their unmet needs, and to define what we can contribute, allows us to bring them a solution at an opportune moment. It enables us to matter more to others, and for others.

Business empathy is becoming increasingly important as the world shifts to a culture of demand creation (Zaki, 2019). The empathetic business model focuses on elevating a client’s value proposition: it depends on our ability to identify ways of making the client more valuable to its customers. In order to identify these means we have to step beyond our client to the customers they serve. We have to understand customers’ needs and to transmit that understanding to our clients. When we understand what drives our client’s success, we gain a deeper insight into the value proposition they rely on and, henceforth, we can work with them to elevate their value proposition to respond more effectively to their customers’ interests. We can examine value more expansively through the lens of Christensen who poses the question of what is the ultimate metric by which we measure the value of our lives. Christensen’s response to this question is both instructive and poignant: “This past year I was been diagnosed with cancer and have faced the possibility that my life will end sooner than I planned. The experience has given me an important insight into my life. I know I have had a substantial impact in business, yet as I’ve confronted this disease it has been interesting to see how unimportant that impact is to me now. I have now concluded that the metric by which God will assess my life isn’t dollars but the individual people whose lives I’ve touched and hopefully help them become better people. My recommendation is to think about the metric by which your life will be judged and make a resolution to live every day so that, in the end, your life will be judged a success” (2010, p. 4). In the world of global sales, the metric identified by Christensen is even more important. In a market where almost everything is or will become a commodity, how we sell is as important as what we sell. The ways in which we

occupy our space is of the utmost importance; it is the key distinguisher in a sea of uniformity (Hayes & Styrlund, 2014).

Action

The decision to put authenticity, mastery, and empathy into action is the differentiator between potential and the reality of accomplishment. Hayes developed a formula that combines the first three dynamics and multiplies their impact through action. Relevance requires authentic skills executed with mastery and built on an empathetic understanding of others. We can exhibit authenticity, mastery, and empathy, but it requires action in order to translate these qualities into meaningful impact. Action moves us from necessary preparation to actual relevance in our lives.

Just as authenticity has its challenges, so too does the decision to act. A plethora of choices gives the illusion of unlimited choice. Deciding on one option means excluding other potential options. We can therefore be reluctant to commit to a single path when we know it means forgoing others. This exclusion of potential choices explains individuals' reluctance to make decisions (Hayes & Styrlund, 2014). These four core dynamics have served as the basis for our body of work in creating learning experiences, delivering keynotes, and organizing executive workshops. The core concept of business relevance lies at the heart of our firm's work.

We view success, significance, and relevance as three distinct but interrelated objectives:

- Success reflects the achievements and recognition we receive as the result of applying the gifts and skills we have mastered.
- Significance can be defined as our progress toward the purpose we have defined for our life with the resources we have been given. It reflects our internal perspective: who we are, what matters to us, and what we do.
- Relevance pushes our impact beyond our inner self by engaging an external perspective on our individual significance.

Our relevance is determined by how others perceive who we are and how we matter to others. In a world characterized by a surfeit of information and a desire for wisdom, relevance is not a matter of what we know; it is a matter of how what we know matters to someone else. This definition of relevance has revolutionized our professional practice. In our business, we see the expansion of

commoditization, which has spread from material resources to human resources. Individuals are subject to the processes of commoditization: global workforces appear to be turning into interchangeable human cogs. Individuals increasingly fear the erosion of their security and the threat of irrelevance. We worry that unpredictable economic sea changes will rob us of our agency before we have time to adapt. Business people and the businesses they serve feel like mere commodities, where the only factor that matters is price.

Commoditization is the enemy of meaning. In ages dominated by the forces of commoditization, individuals pay the price with devalued lives. Today skills have become the target of commoditization. When a skill such as assembly-line work or customer service is mutually interchangeable, it can be easily digitized and transferred to lower-wage locations. In this context such skills become fungible. By contrast, unique skills requiring mastery, creativity, and expertise, such as those of skilled surgeons, are nonfungible. They are therefore safe from the threat of commoditization. Unless individuals have the power to defy commoditization and define their own lives, their potential is vulnerable to the threat of objectification.

We envisage relevance as a concept for business success and personal growth. We do not experience our professional and personal lives as separate worlds; for us, they are intertwined and holistic. The principles of relevance apply whether we are having a conversation with our life partner or our business partner. In both cases, being interested in discovering unmet needs helps us to matter more. Today's world is not compartmentalized, and the principles of relevance can help us in all spheres of our activity. Our approach draws from the wisdom of the past and the best thinking of today. Because we have conversations with clients around the globe, we work to align ourselves with the zeitgeist and to channel innovative thinking in our insights aimed at helping our clients to succeed. We seek to embody a fundamental imperative in our lives to matter to others, to serve others, and to support each other in mattering more.

We created a framework for people and companies to become more relevant in their lives and marketplace. *Relevance*, the book, was created to share the tools that we have developed. We argue that relevance is attainable. Furthermore, we contend that using the tools we have developed to help achieve relevance in companies, in business, and in personal lives functions as a tool for attaining security in an insecure world. Nevertheless, we recognize that there is no universal

solution for attaining relevance. Despite the pretensions of contemporary business books and motivational speakers who seek to create simple formulas for success, we are aware that that success is not identical in different contexts but is inherently individual and dependent on context. When one studies the best practices in one successful company, that does not mean that these practices will work equally successfully in a different company. Successful strategies are dependent on context for their successful application. Organizations and sales environments are idiosyncratic, which helps to explain the existence of unique branding. There is not a single, uniform approach that will work for every company. Motivational approaches may be inspiring, but we know that motivation is a disciplined choice made by individuals. It cannot be set in motion by a single speech.

Formulas can be superficially attractive, but the measure for their success is their applicability in the real world. We wanted to create a formula with real-world applicability and effectiveness. It would function as an equation to guide the personal and professional brands of our colleagues, clients, and their businesses to relevance. Hayes explored the elements of relevance and theorized how their interrelations could be encoded in a way that could be applied to the life of a person, an organization, or a product (Hayes & Styrlund, 2014):

The Keys to Relevance (Developed by Tom Hayes):

Au = Authenticity

M = Mastery

E = Empathy

Ac = Action

R = Relevance

The Relevance Formula (Developed by Tom Hayes):

$$(Au+M2+E) \times (Ac) = R$$

Our body of work on relevance intersects with Dr. Squire's work on mindsets and Dr. Kiel's work on character science. Drawing on the insights of these different models, we see the emergence of a vertically developed competence that reflects the essence of how people experience us. In the profession of selling this competence can be conceptualized as the ability to be present.

C.S. Lewis observed that the key to life is to “major in the majors, not to major in the minors” (1962, p. 26). Because distraction looms so large in today’s world, it has never been more difficult to put into practice C.S. Lewis’s advice. Given the permanent state of distraction in today’s world and the widespread fatigue experienced in the face of complexity, it is no small challenge to establish a firm foundation for mastery and relevance. The volume of complex data generated by the Internet and by media imbues the trivial with unprecedented attraction. However, the trivial is not conducive to the cultivation of mastery. We might become adept at activities that lack importance but this majoring in the minors, to borrow C.S. Lewis’s turn of phrase, will not help us to develop the valued skills that distinguish us in a commoditized world.

In order to combat trivial distractions, we first have to recognize them. The symptoms of distraction are easy to identify and include:

- Addiction to activity;
- A mental state of characterized by overload;
- The compulsion to excessive access facilitated by technology;
- The emotional absence of individuals engrossed in portable devices while oblivious to their immediate surroundings.

We use public transport and engage in social events and professional meetings, and yet on these occasions our focus is on our technological devices rather than on the people around us.

Consequently, we risk missing these connections with other human beings and falling prey to the destructive power of this lack of human connection on our emotional wellbeing and organizational function (Hallowell, 1999). One of our deep concerns with social media is its seductiveness. Using social media, individuals can create online lives that infuse their cyber identities with more importance than their real-life identities. When energy is dedicated to a simulated self, or invested in the digital world, meaningful face-to-face interactions suffer. As society becomes more isolated, we sense electronic connection growing hand in hand with relational disconnection. This trend renders the ability to connect with relevance ever more important, even as it becomes rarer in our society.

Slowing down to address the pressures of complexity opens opportunities to review and assess our beliefs, and to reconnect with our authentic self. These practices, in turn, build mastery. Moving at speed makes us vulnerable to error. It leaves little time to analyze the errors we make and to learn

from them. When success becomes our only focus, there is less scope to value practice and discipline. We may take risks and fail, but we lose the crucial lessons that failure must teach us.

In reflecting upon the work on relevance, we are aware of the balance that is needed between aspiration, expectation, and limitation. Focus is of paramount importance in the quest for mastery. Aspirations are a fundamental step in the process of achieving success. In our professional and personal lives, we must plot our journey with our objective in mind. When we have identified the skills we want to master, we can plan the action steps we need in order to achieve our goals.

When high aspirations are tied to equally high expectations there is a risk that we will feel pressure to meet the ever-increasing demands of our expectations. As our focus shifts to the demands of new, unattainable goals, mastery changes from being a rewarding practice to being a constantly moving finish line. Under these circumstances, critical reflection becomes difficult, and we lose sight of the realization that our limitations are opportunities for us to learn more. Caught in a race to succeed, we fail to allow ourselves the time to consider the reasons for our mistakes. Therefore, we lose the opportunity to improve. Combining high aspirations and high expectations is a formula for exhaustion and frustration. When we are overly focused on the distance we have yet to travel, we fail to give ourselves the reflective time to savor the journey and appreciate the progress we have already made.

An intriguing trait that has been identified by analysts of business points to one way of avoiding the aspiration/expectation trap. Learning agility describes the speed and willingness with which we learn new competencies and adapt our thinking and behavior to the challenge before us (Hoff & Burke, 2017). People with learning agility can analyze a situation from multiple perspectives and adjust their approach as they go, even if this adjustment means pushing beyond their preferred style. Agile learners exhibit critical thinking skills and the insight to leverage their strengths. They are comfortable with the discomfort of change. Although these learners are driven by the desire to achieve, they do not pursue achievement single-mindedly. They place a higher priority on learning and improvement than they do on success. The preeminence of learning in the agile learner's value system makes them an excellent role model for mastery.

When we make learning a priority, we divide our attention between the challenges ahead and the

personal growth we achieve through assessment and reflexivity. We learn during this process of development, and our focus is balanced between past lessons and future aspirations. With this changed attitude toward learning, we are more likely to feel satisfaction with every step of the journey. Embracing learning agility prompts us to prioritize the ongoing discipline of mastery over the rewards of accolades. Learning agility implies an awareness of the limits of our knowledge. Our self-confidence regarding our competencies is balanced by self-honesty regarding our shortcomings. Agile learners do not allow unrealistic expectations to govern their behavior, and they maintain a sense of transitional thinking (Styrlund & Hayes, 2014).

Beliefs are a driving force behind decisions, and, in turn, drive behaviors, which become practices over time. Mastery invites us to define a personal vision and a purpose in our lives. It asks us to live with an objective, accurate view of ourselves. When we practice mastery, goals become moving targets to be continually clarified and redefined as we pause to assess our progress. We hold creative tension between our vision for the future and our current reality. We have a vision for the contribution we hope to make, but we also take the time to appreciate how far we have come. We find ourselves embracing curiosity and becoming more inquisitive. Because mastery is committed to the truth, we align our personal values with time-honored principles of honesty, integrity, and discipline. Mastery is a way for us to strive to be the best version of ourselves. This is a lifelong journey dedicated to achieving our full potential as human beings and to applying our skills appropriately in the service of others.

Mastery is rooted in understanding of the context in which we excel. That context can be conceptualized as our authentic promise; it is a promise as important to individuals as it is to companies and products. Our promise reflects both our strengths and our limitations. An honest inventory enables us to see ourselves in an accurate way. Our definition of personal mastery encompasses three components:

- Our skill set: identifying the strengths that are unique to us.
- Our mindset: the courage and consistency to remain focused on our objectives and the path to achieving them.
- Our experience set: the lessons we learn through the practice of our skills.

Mastery benefits from a mindset that understands the balance between aspiration, expectation, and limitation. Every time we interact with people, in any context, we transmit information that reveals our identity to people. This identity can be understood as a type of promise. When we make it our goal to deliver a dependable promise that accurately defines who we are, our actions reflect both our authenticity and our talents. People want to connect with individuals who listen, tell the truth, and deliver on their promises. Service rooted in authenticity is an important distinguishing factor. Cultivating realistic and dependable expectations requires us to understand our authentic self, to choose the disciplined path of mastery, and to seize the lessons that enable us continually to refine our skills.

Dr. Squire's research brings specificity and clarity to the concept of mastery, as conceptualized with regard to the future of selling. Squire's insights were prompted by his research on the phenomenon of uneven performance across sales teams: "an alarmingly small percentage of salespeople sell effectively. Squire's work sets out to address the following question: "Why? Why after 1000s of years of practice in the art of buying and selling, and more recently with the benefits technology can potentially bring, are the experiences of buyers still so negative towards sales?" (2021, p. 36). In essence, Squire's research addresses the absence of relevance on the part of the majority of professional salespeople.

Reflections and Implications: Relevance Public Works

Dr. Squire's research on mindsets and lived values guides our exploration of Dr. Fred Kiel's work on character science. The return on character taxonomy constitutes a basis for our ongoing research and evolving approach to developing the future sales leader and professional.

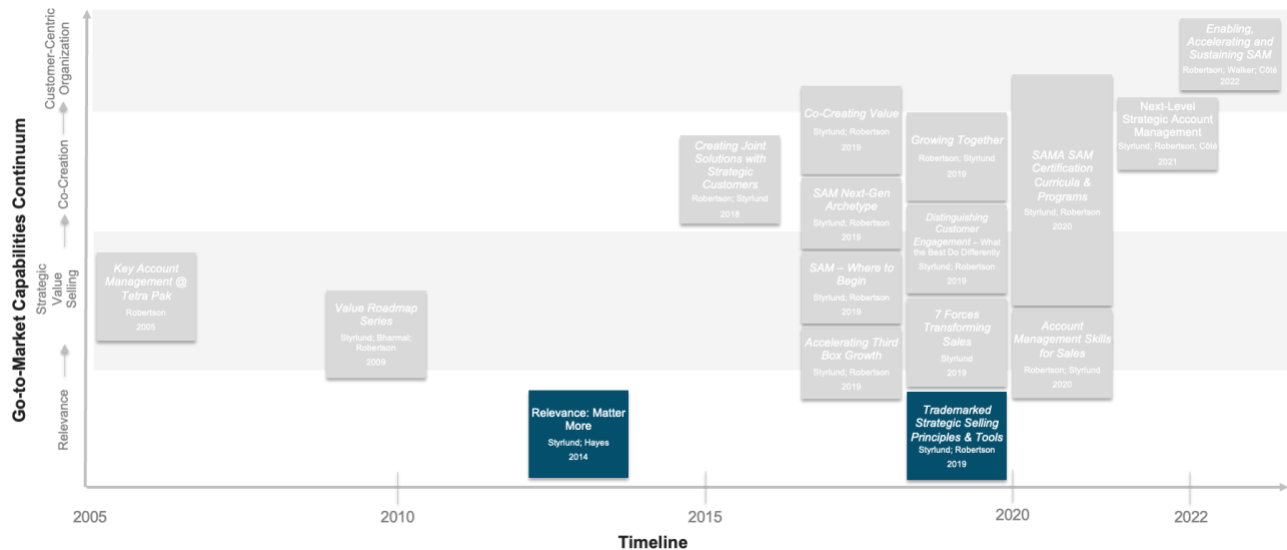


Figure 15: *Relevance Public Works Timeline Mapped to a Go-to-Market Capabilities Continuum (Styrlund & Robertson)*

The lenses of character and mindset, applied to the continuum of our Public Works (Figure 15) accentuates the significance of relevance as the foundation for customer engagement, commitment, strategic selling, co-creation, customer-centricity, and ultimately enhanced impact in the fourth era of selling.

3.3. Public Works: Strategic Value Selling Process, Principles & Learning

Around the time we began collaborating with clients on value selling initiatives, Thomas Friedman was writing “The World is Flat” (2005). Technology transfer, democratized innovation, seamless supply chains, offshoring, and globalization were driving waves of consolidation and commoditization across industries. On one hand, these forces enabled new industry upstarts around the world and particularly in China to become competitive threats with the ability to challenge long-established incumbents in short periods of time (Shih, 2018). On the other hand, industry leaders were aggressively consolidating in order to protect and expand their market positions and leverage their scale and buying power via centralized procurement organizations (Deans, et al., 2022). These dynamics negated sustainable differentiation and accelerated commoditization by exerting intense downward pressure on the price of products and services. Traditional features-benefits selling techniques played directly to the price/discount strategies of customers’ procurement organizations, which increased pressure on suppliers to lower prices (MIT

Management Sloan School, 2019). For supply-side organizations value-based selling became an imperative to counter the rise of procurement acumen and to mitigate the threat of commoditization driven by their customers' increasing buying power and the emergence of new market entrants. Yet many companies continue to encounter difficulties as they seek to turn their value-based strategies into action (Keränen, et al., 2021).

Early adopters and clients of our value selling methodologies were consumer products companies such as Proctor & Gamble, Kellogg's, SC Johnson, PepsiCo, and General Mills. These companies adopted our methodologies in response to their customers' (mega-retailers such as Wal-Mart and wholesalers) centralization of supplier management functions to increase their buying power and leverage over suppliers. Subsequently, the effects of globalization, technological change, buy-side consolidation, and democratized innovation rippled across industries. These effects were felt, in turn, by our consulting business. After being adopted in the consumer products sector, these value-centric, go-to-market sales strategies extended to clients in technology, telecommunications, and software (HP, Cisco Systems, Computer Associates, Microsoft, Ricoh, WWT, Xerox, AT&T, Bell, Nokia, Motorola, SAP, Virgin Media), automotive and aerospace (Cox Automotive, Textron), travel and hospitality (Marriott, IHG, Hyatt, Delta Airlines), manufacturing (3M, Tetra Pak, Donaldson, John Deere), and, more recently, healthcare, pharmaceuticals, and life sciences (Abbott, GSK, Johnson & Johnson, Medtronic, Merck, Novartis, Mayo Clinic, and Pfizer).

Our engagement with a world-leading healthcare technology company over the past 12 years illustrates our personal and professional partnership, which has led to the collaborative development of our Public Works. The CEO and Chairman of this client organization recognized the commoditization risks of competing on product in the healthcare marketplace and championed the industry's awareness of economic value. Considering their global strategic direction, a small group of leaders representing their company's business across regions engaged us to facilitate their transformation of how they went to market from a technology-focused approach to one centered on customer value. This self-styled "coalition for the good" resonated with our complementary yet contrasting styles, experiences, and acumens. Phil embodied the mindset, leadership, and emotional intelligence required to mobilize change in a successful organization, which had until now been attached to the methods that had worked in the past. James brought the rigor of process-driven and architectural, value-selling design thinking, which would enable effective lateral learning

and development. This small cadre of leaders who were passionate about change mobilized their network of 90,000 employees and led multiple value-selling initiatives across all geographies, roles, and therapy areas. These initiatives resulted in significant above-market growth and share gains of almost 300% from the time of our first engagement (Google Finance, 2022). At the pinnacle of value-selling, we recently activated and orchestrated a co-creation initiative between this client and one of their strategic customers, a national healthcare entity, which was seeking to establish public-private partnerships to tap into the innovation and resources of the private sector to develop a world-leading neuroscience center.

On one hand, this engagement can be regarded as a highly successful example of our long-term covenant client model and approach. However, on the other hand, owing to our new perspectives, we recognize that our focus with this client over the past decade has centered habitually on value-based selling processes, principles, and horizontal learning. We ask ourselves how we might have accelerated organization change and more deeply embedded customer centricity into the culture of the company. A fundamental shift of this nature would have enabled sustained impact throughout the healthcare value chain, which ultimately affects patient lives and community well-being. In retrospect, our lack of awareness led us to give insufficient consideration to the importance of integrating vertical development of transformative fluencies. This vertical development would, we now believe, have enabled ecosystem value networks to navigate, collaborate, and operate more effectively in the complex context of healthcare.

This realization is strengthened when we consider that our clients – namely Fortune 500 companies – have the scale and resources to choose from a myriad of strategic/value selling consulting and training firms. We often asked ourselves why these industry-leading, market-shaping companies chose to engage and collaborate with us, a small cadre of consultants at The Summit Group. Our clients' feedback in response to this question usually resonated with the seven themes noted above (See pages 27-29). Clients recognized that our thinking and approach:

- Is relevant and aligned with their strategy;
- Is pragmatic and non-prescriptive, and thus provided freedom within a framework, which enabled the sales organization to adapt to their own way of working;

- Changes the way the client's go-to-market organization collaborates with their customers, which enabled customer centricity to become part of their company's brand and created a differentiating customer experience that delivered measurable results for the client and company.

Despite the positive client feedback, we were cognizant of the fact that the same accolades could be applied to many of our consulting competitors. What we learned from client feedback was that what appeared to differentiate us was the way we engaged prospective clients. We were told that we listened with empathy, and then responded with relevant insights, examples, and ideas, and that our behaviors modeled how our clients wanted to transform their sales organizations' engagement with customers.

Digging deeper into what appeared to be an all too simple point of difference – listening, empathy, and insights – we began to recognize that our differentiating approach to engaging clients – namely, the way we behaved with clients – came authentically from who we are. Our differentiating approach was not rooted in the methods, processes, and tools we provided. Who we are and our behaviors are, in turn, guided by our character, mindsets, and values, as described in Chapter 2. Our mindsets and values have been shaped by our lived experiences – our families, the culture, and communities in which we have grown up – and by our work life and career experiences. The Summit Group consultants have walked in our clients' shoes and have held positions as sales representatives, sales managers, and leaders of strategic account teams/organizations in large complex companies. These prior experiences provide us with the perspectives, pragmatism and empathic insights that appear to resonate with prospective clients.

While our client engagement initiatives centered on developing and activating value-selling and account management process, principles, and tools enabled by horizontal, competency-focused learning, we intuitively recognized that process and competence/skills-based learning alone were insufficient to transform how our clients engaged their customers. Since 2010 we have developed our practice in line with these insights. We no longer offer a simple suite of sales training programs. We now integrate:

- Go-to-market consulting and assessment of sales organizations and people;
- Sales leadership, coaching, and communities of practice;

- Learning journeys, or curricula, that develop individual and team capabilities from foundational to advanced skill levels, with the option for certification by an external benchmark account management/value-selling association (SAMA, 2022);
- The practice of resilient thinking and mindsets in the context of our client engagements. We have collaborated with Dr. Paul Stoltz, a thought-leader and researcher into the impact of the GRIT mindset (2014) in cultivating resilience as a hallmark of high-performing sales organizations, and with Dr. Phil Squire, to build awareness and activate a values-centric approach to selling (2021);
- In 2015 we initiated a collaboration with Dr. Fred Kiel, shortly after he published *Return on Character* (2015), which has led to the *Return on Character for Sales* research project, currently underway, with the ambition of identifying the character habits that have the greatest impact on sales results and personal, organizational, and societal growth.

This evolution in our consulting practice highlights the ways we have challenged our biases and tested our implicit assumptions regarding the world of sales learning and development. As a result of this interrogation of our practice, we have transformed our professional activity over the past decade by integrating elements of vertical learning and development. We have been guided primarily by intuition in this endeavor. However, now we plan to capitalize on the opportunity to continue this enterprise with clear purpose by drawing on groundbreaking practices in leadership and by taking a systemic perspective of the client organization.

Three key influences have amplified the urgency, intentionality, and clarity with which we see the future possibilities of integrating vertical development into our primarily lateral client services and consulting practice:

- First, we detect a number of challenges facing sales organizations. One of our client's sales leaders recently remarked, "You can't pour more water into a glass that is already full". This comment encapsulates the difficulties affecting the industry. Sales processes and dashboards have been optimized; CRM and sales enablement systems and training have been deployed. The recipients of these innovations and chief actors in the sales process, i.e., sales people, do not possess the cognitive capacity or motivation to do more. In the face of rising quotas, changes in customers' buying behaviors, and transformations heralded by the pandemic, marginal gains in performance are achieved at the cost of increasing stress and significant

declines in sales people's mental health (Uncrushed, 2012). Petrie (2022) describes the problem with a colorful metaphor: the cup of sales knowledge is already full. Sales people now have the knowledge, systems, and tools. They are no longer constrained by a lack of these components. The limiting factor is the cup (the sales person's mindset, perspectives, and values), in particular their capacity to hold simultaneously competing ideas and not to be stalled by mental paralysis.

- The second key influence on the new direction our work is taking is our collaboration with Dr. Squire, which informs our understanding of the role of mindsets, and with Dr. Kiel, which has helped to make our intuitions tangible through the findings of character science.
- The third influence is our critical reflection as part of the doctorate, guided by Professor Brian Sutton and Dr. Kate Maguire, which has accelerated this progression to uncover and name the previously known unknowns, and reflect on what this means for us, our firm, and the future of the sales profession.

Reflections and implications: Strategic value selling public works

For most of the 28 years during which our firm has operated we have focused on horizontal development of sales competencies. These sales competencies are aligned with a strategic, value-selling process, or methodology, which enables sales professionals to understand customer needs, create relevant solutions (leveraging existing products and services), communicate value propositions, and establish a plan of action (an account or sales plan) to achieve agreed targets and objectives.

Our horizontal approach to development, as evidenced in this cluster of Public Works, has been recognized as industry leading practice (Brandon Hall Group Learning Excellence Awards, 2022) and will continue to serve our clients well in the cause-and-effect, supplier-buyer environment in which many salespeople and organizations operate. In such environments, there is a focus on efficiency, and work is performed primarily by individual contributors with the goal of achieving well-defined metrics such as revenue growth and customer loyalty. In this context, the Summit Group's practices enable our clients to optimize their sales process and ensure predictable results. However, our consulting engagements, research, and analysis of the demands placed on sales professionals in the fourth era of selling reveal what appears to be a growing gap in the capabilities

and development needs of the sales professional of the future. We have observed several factors that have accelerated the demand for higher-order, transformative sales capabilities:

- The rise of digital technology and Artificial Intelligence (AI), which have facilitated new ways and omni-channel options for customers to buy. These technologies have replaced and improved on traditional sales functions, even for the sale of complicated solutions. Today's technology can enable a frictionless business-to-business (B2B) buying process with near-immediate results. The "Amazon effect" (Forbes, 2018) has created B2B customers who expect a similar experience when buying for business as they do in their personal, consumer world. For example, B2B buyers anticipate proactive recommendations of relevant products and services, provision of insights, shared user experiences and ratings, and one-click purchases. They expect transparency with regard to price, finance, supply, and delivery options. Existing AI technology, powered by machine learning, can automate and augment much of the sales process (Kaput, 2022). Snowden's Cynefin Framework (2022) illustrates that AI can replace most of the human-to-human interface in the simple and even complicated domains of B2B selling by using large data sets and computer science techniques to extract insights and generate real-time predictions, recommendations, and decisions. We suggest that it is too simplistic to intimate that humans and technology will each play to their strengths. Rather, we anticipate that AI will help the sales professional do better human work throughout the customer engagement and buying journey. AI will hone emotional intelligence, refine business empathy, and elevate creativity and strategic thinking. AI will enable team leadership and guide interpersonal communication and collaboration to build trust, improve relationships, and sustain commitment (Styrlund & Robertson, 2023).
- The increasing complexity of customer challenges undoubtedly present the greatest opportunity for value creation, but these challenges can no longer be tackled with the traditional sales skills and organizational capabilities inherent in a linear and predictable sales environment. Furthermore, there is a heightened risk of failure to achieve desired outcomes when applying simple sales practices and attempting to replicate best practices in an unordered, complex environment (Kurtz & Snowden, 2003). Examples of complex problems with high-impact potential faced by our clients include the following:
 - The collaboration of medical technology and pharmaceutical clients with healthcare delivery systems, hospitals, and communities to mitigate health inequities and improve health outcomes in under-served populations; the relocation of sites of care from the acute hospital

setting to lower cost ambulatory or home settings (leveraging telemedicine and wearable diagnostic and therapeutic devices) without compromising outcomes; integrating mental, psychiatric, and clinical care practices to treat patients with disorders such as Parkinson's, ischemic stroke, and dementia.

- Redefining the automotive industry from manufacturing, selling, and servicing cars to enabling mobility.
- 3M, Cisco Systems and Gale International's collaboration to develop smart cities that are equipped to tackle the challenges city administrators and governments face as a result of rapid urbanization and decaying infrastructure (South China Morning Post, 2010).
- The need for functional expertise to effectively collaborate across siloes and organizational matrixes, as high-performing, agile teams, to leverage all company resources in the quest to co-create value in their increasingly complex, AI enabled operating environment.

It is clear that even in simple AI-led sales environments, human salespeople and soft skills will play an important role in enabling high-performance selling. We observe an inverse interaction reality: human interaction will decrease, while the criticality of the real-time, relevant, human-to-human interface will increase in an omni-channel, AI-driven world. The challenges posed by the fourth era of selling increasingly fall into the complex and even chaotic domains of Snowden's Cynefin framework and will require new and evolved capabilities and fluencies. Salespeople, leaders, and sales organizations will need these new capabilities and fluencies to make sense of complex situations, to think strategically, to co-create, to guide human-to-human interaction, to lead and work in teams, to facilitate interpersonal dynamics and collaboration, and to build and sustain trust.

The critical reflection in our doctoral process has uncovered the crucial role character science and mindsets will play in the rapidly developing, VUCA world of the sales professional. As analyzed in Chapter 2, and as illustrated in the *Return on Character® Value Chain* (Figure 5, page 54), character science and mindsets are foundational elements that underpin the next-level sales, teamwork, and leader fluencies that enable sales people and customer teams to build trust, collaborate, and co-create novel practices to address problems worth solving. These sales fluencies are instrumental in adapting to this rapidly changing situation. They empower sales teams to transform their capabilities and provide enhanced insights, a greater capacity for sense-making, and more solid foundations for decisions. In turn, this enhanced understanding of sales situations

allows salespeople to better orchestrate their action, to help clients realize their goals and, ultimately to achieve an impact on the organizational culture and the societies in which they operate. In order to facilitate this transformation, new ways of developing salespeople will be required, beyond the traditional, horizontal process and skills-focused approaches employed today.

While Kegan (1994), Torbert (2006), Petrie and the Center for Creative Leadership (2014), and other theorists have applied adult vertical development to leadership, we are not aware of any sales training organization that has specifically focused on vertical development for sales, other than Consalia's application of sales mindsets and reflective practice, as described in Chapter 2. Vertical development constitutes a significant gap in sales training, learning, and development practices. The sales training industry, our firm, and Public Works, have been focused on horizontal development of strategic/value selling process-related skills (Illustrated in Figure 16), in part, because:

- This process-focused, efficiency-centric selling approach has become the status quo and has predominated over the course of the first, second, and third eras of selling.
- Sales training is increasingly being relied upon to measure the return on training investment. The qualities enabled by vertical development, such as greater adaptability, self-awareness, collaboration, and the ability to transcend boundaries and span networks, are harder to measure than the outcomes and metrics of horizontal development, such as sales funnels, number of sales calls, and revenue (Henley, 2020).

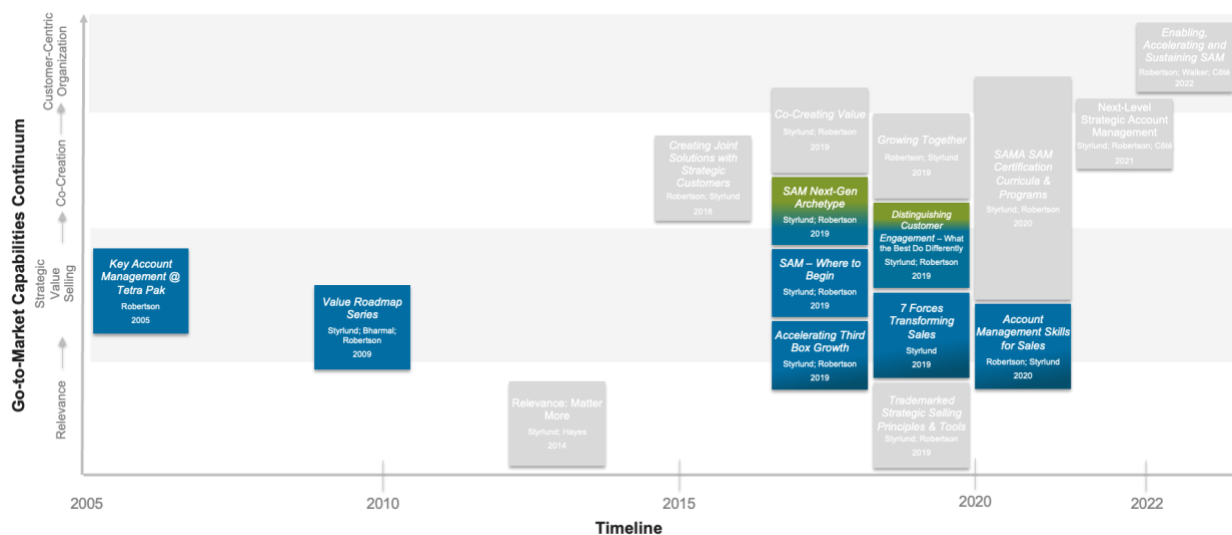


Figure 16: *Strategic Value Selling Public Works Timeline Mapped to a Go-to-Market Capabilities Continuum (Styrlund & Robertson)*

3.4. Public Works: Co-Creating Business Value

Co-creation has emerged over the past decade as the next level of strategic value-based selling. At its core, co-creation constitutes the active and collaborative engagement with the customer in the alignment of their needs to a supplier's overall capabilities. Our collaboration, as illustrated in our Public Works, has been central to the development of a thought platform that made co-creation actionable in a business-to-business context. Initially, we branded this practice area as *Collaborative Value Creation*, with a fundamental framework consisting of five key steps and guiding questions and discussion points:

- 1) Determining the key business issues and drivers of the customer:
 - Identifying the major business issues, initiatives, and drivers in the next 12-36 months
 - Using the Business Compass model
 - Client validation and discussion
 - Exploring why the client has these major areas of focus
 - Identifying who is leading or involved
- 2) Assessing customer value drivers and business model:
 - Identifying the major issues, initiatives, and drivers in the next 12-36 months by business segment
 - Using the Third Box Thinking Model
 - Client validation and discussion
 - Exploration of why these are the major areas of focus
 - Identifying who is leading or involved
 - Client key KPIs
 - Client validation and discussion
- 3) Identifying the customer's tactical agenda:
 - Major Careabouts in 12-18-month timeframe
 - Company perspective using Careabouts model (what, why, how, who)
 - Client validation and discussion
 - Their expectations and measurements
 - Exploring one's value to the client

- 4) Clarifying the supplier's role, relevance, and performance:
 - Analysis of the company's expected role in each issue and initiative
 - Analysis of the client's performance in each area
 - Creating the Relationship Scan (Relationship Scan model)
 - Identifying what the supplier delivers of value
 - Identifying what the supplier could do deliver greater value
 - Identifying areas in which the supplier no longer needs to deliver
 - Identifying what the supplier has not delivered and is not wanted
- 5) Developing joint action plans, roadmap, and next steps:
 - Analysis of the future major joint initiatives (5/3/1 Roadmap model)
 - Identifying the lead people from the supplier and the client
 - Exploring mechanisms to communicate and stay aligned.

This initial co-creation framework has evolved over the years to become central to our consultancy practice. The purpose of these co-creation engagements is to facilitate alignment between suppliers and customers around business and strategic objectives. The outcomes of the co-creation framework comprise a joint strategy and action plan guiding how both parties together can provide relevant resources to achieve an impact with regard to top priorities and drive mutual business growth. The focus of the dialogue is to optimize the working relationship, to create mutual value, and elevate and sustain organizational alignment. This co-creation process enhances the customer's ability to accelerate business growth goals by better leveraging all the assets and resources that the supplier has to offer and by providing an opportunity to direct these resources to the areas in the customer's business where they can have the most impact. In this way, better overall alignment is achieved, which in turn accelerates business results.

The development and delivery of our co-creation work is informed by the character habits of Dr. Kiel. In our engagement with clients, the integrity and intuition with which we facilitate the sessions is essential to the outcomes. It is important to guide in a way that allows the client to explore the topic independently and not supply answers but to frame the salient questions to achieve clarity and meaningful outcomes. Mindsets provide the conceptual underpinning of co-creation with regard to several key aspects: first, the need for authenticity and transparency in the dialogue; second, the

need for tactful audacity and an ability to be provocative but not arrogant; third, client centrality, which is the core ethos of a co-creation dialogue and provides for the ultimate goal, which is to ensure the optimal alignment of the supplier's total set of assets and capabilities with the customer's priorities. The mindset of proactive creativity lies at the core of co-creation in that the supplier brings a body of insights based on their work with other clients with similar needs.

We have observed many high skill-set individuals that had self-limiting mindsets and behaviors, which muted their impact in the marketplace and damaged their careers. This fundamental alignment-based ethos became central to the living brand of our firm. The thinking that underpins this perspective stands in sharp contrast with the past forty years of sales training, which has been based on the art and science of persuasion, presenting, and pitching. We brought to market an entirely different perspective based on listening, aligning, and collaborating.

As we have expanded our understanding of the concepts of complexity and intractable problems we now see life, business, and societal issues from an entirely new perspective. As we listen and observe the world today we see a multitude of problems facing leaders in both the public and private sectors. It is our belief that the future will depend on cross-enterprise alliances engaging in the co-creation process to address these problems in a higher order manner. Therein lies the potential for a type of innovation that brings together a diversity of perspectives and transdisciplinary thinking to create higher order innovation.

An ongoing example of this innovation is found in our work in the automotive/mobility industry. We are currently involved in helping orchestrate a cross-industry consortium to create de facto standards for the emerging business of mobility, driven by the younger demographic in particular, who seek to escape from the responsibility and implications of vehicle ownership but to enjoy the benefits of transportation regardless of time and place and by any means at their disposal (McKinsey & Co., 2019). We are co-creating a future strategy map and landscape that could not be created by any individual player in the value network. These types of diverse and yet structured collaborations are part of the antidote to a future of intractable problems and complex challenges. In essence, diversity of thought is the core solution for these problems. However, that diversity of

thought needs to be met with structured thinking, transdisciplinary perspectives, and the agility to create the next generation of innovation and insights. The ultimate market advantage in the fourth era of selling will pertain to those firms that can leverage diversity of thought and insight applied to the highest needs of their industry and customers. Innovation requires agility and the ability to pivot with purpose, based on advanced processes. It is contingent on listening to and carrying the voice of the customer on the outside to the leadership on the inside. These structural changes to the industry call for the sales professional of the future to be more adept in the art of structured storytelling to their own leadership and company in order to amplify the unfettered voice of their customers.

Reflections and implications: Business value co-creation public works

An analysis of our bodies of work reveals the patterns underlying the expanding value created by those companies that employed higher-order collaborative selling approaches. We could have made more rapid progress in our expansion into this area of co-creation, yet we found ourselves constrained to move against the undercurrent of decades of training based on persuasion-centric science and embedded biases.

Character science and mindsets provide labels and frames of reference for what we intuitively sensed was needed for the marketplace in the future of selling. Dr. Kiel, in essence, codified some of the ideas we had long held about the industry, namely that being an ethical person improves business competence and has a direct correlation to business and financial outcomes. The mindsets of the future as identified by Dr. Squire are an elegant articulation of the next generation of types of acumen required by strategic selling professionals as they reinvent their relationship with ambiguity and complexity.

Our experience with co-creation underscores the important role played by trust, teamwork, and cross-boundary collaboration, which are far more important than process, tools, and technology systems. The significance of these personal attributes, in turn, highlights the importance of personal mastery in lifelong development. Furthermore, the potential of personal mastery for organizational development reinforces our appreciation of the need for transformative learning both within and beyond the industry of sales training. Laurel Tien of the California Institute of Integral Studies offers

a compelling perspective on transformative learning. Tien describes transformative learning as a deep, structural shift in basic premises of thoughts, feelings, and actions (2022). Two major elements of transformative learning are critical reflection, or critical self-reflection, on assumptions and critical discourse, where the learner validates a best judgement.

Jack Mezirow first defined the concept of transformative learning in 1978 (1978). In devising the concept, Mezirow draw on a number of influences, including Kuhn's paradigm (1996), Freire's conscientization, and domains of learning (2022). Despite the significance of Mezirow's theory, there are a number of critiques of transformative learning. It has been argued that it emphasizes the rational approach and, as a result, ignores the importance of intuition, imagination, emotion, and embodied approaches (Tien, 2017, p. 11).

Tien advocates an amplification of the purview of transformative learning so that it meets the need to ground inquiry in a teaching and learning theory that is better able to adapt to the different stages of the inquiry process. Other frameworks considered are holistic, integral, contemplative, and evolutionary. Tien agrees with Burack (2014) that although the terms holistic and integral are sometimes used synonymously, there is literature that helps to distinguish between the two.

Holistic knowing values the whole person. It takes into consideration the body, mind, heart, and spirit and tends to use a systems theory, as well as different religious, spiritual, and postmodern philosophies that emphasize contextuality, relationality, and interdependence (Burack, 2014) (Ferrer & Sherman, 2009). An epistemology of contemplation "includes the natural human capacity for knowing through silence, looking inward, pondering deeply, beholding, witnessing the contents of our consciousness" (Haynes, 2009, p. 24). Contemplative knowing, when brought into teaching and learning, offers students a new relationship with themselves, others, and the world. Tien posits that contemplative inquiry offers an "epistemology based not on data, information, and the separation of subject and object, but on knowledge, wisdom, and insight about the interconnectedness of all things. Such contemplative inquiry can lead to an education that transforms the student" (2017, p. 11).

A living theory approach, which considers how the research method employed impacts on the researcher, puts into practice the methodology of action research and offers a framework to support

this cyclical journey of transformation (Stringer, 2001) by pursuing action and research outcomes at the same time. Winter (1987) provides a comprehensive overview of six key principles of this framework (Tien, 2017):

1. Reflexive critique: The principle of reflexive critique ensures that individuals reflect on issues and processes and make explicit the interpretations, biases, assumptions, and concerns upon which judgments are made. In this way, practical accounts can give rise to theoretical considerations.
2. Dialectical critique: This type of critique conceptualizes phenomena using dialogue. Dialectical critique enables an understanding of sets of relationships both between the phenomenon and its context and between the elements constituting the phenomenon.
3. Collaborative resource: Participants in an action research project are co-researchers. The principle of collaborative resource presupposes that each person's ideas are equally significant as potential resources for creating interpretive categories of analysis, negotiated among the participants.
4. Risk: The change process potentially threatens established ways of doing things; the researcher is subject to the same process, and learning will take place regardless of the outcome.
5. Plural structure: Research necessarily embodies a multiplicity of views, commentaries, and critiques, which lead, in turn, to multiple possible actions and interpretations. This plural structure of inquiry requires a plural text for reporting. In other words, there will be many accounts made explicit, with commentaries on their contradictions, and a range of options for action presented. A report thus acts as a support for ongoing discussion among collaborators, rather than a final conclusion of fact.
6. Theory, practice, transformation: For action researchers, theory informs practice and practice refines theory in a continuous and mutually reinforcing transformation. In any setting, people's actions are based on implicitly held assumptions, theories, and hypotheses, and with every observed result, theoretical knowledge is enhanced.

When individuals set out to explain their educational influences as they embark on enquiries into how they might improve their practice, they generate a living educational theory. An individual's living educational theory includes evaluations of past learning and a stated intention to improve practice in the future in currently unrealized ways. Improvement of practice is understood as practice that contributes to a world in which humanity can flourish (Tien, 2017).

Tien summarizes her perspective elegantly and succinctly with the statement that educational knowledge is generated through lived theory/action research. Whitehead suggests that a “living form of theory” approach supports teacher action-researchers to present their claims to know how and why they are attempting to overcome practical educational problems: “I experience a problem when some of my educational values are negated in practice. I imagine a solution to my problem. I act in the direction of my solution. I evaluate the outcomes of my actions. I modify my problems, ideas, and actions in light of my evaluations” (1989, p. 41-52). After first positing this notion of a living form of educational theory, Whitehead refined the concept in 1989 when he coined the term “living educational theory” to denote a distinct form of theorizing and research whereby individuals produce an explanation of their educational influence in their own learning, the learning of others, and the learning of social formations. Whitehead refers to the unique embodied expressions of meaning in an individual’s explanations of educational influence (Tien, 2017).

Our research on the concept of living theory enhanced our understanding of co-creation as one of the highest forms of application for living theory in the profession of selling. Co-creation integrates all of the concepts by engaging the supplier and the customer in the interactive dialogue. We have observed that in co-creative sessions, the dialogue, interaction, and debate is of greater importance than the actual outcomes of the session. Living theory provides a lens and lexicon to name, frame, and shape co creation in a higher order manner.

As we reflect upon our business partnership, which now spans over 15 years, we realize that one of the many shared beliefs that brought us together was the joint realization that true strategic selling is based not on persuasion but on alignment and relevance. Co-creation is simply the alignment and realization of self-interest. Co-creation requires us, as consultants, to be better sense-makers and listeners. As orchestrators of empathy, creativity, insights, and collaboration within the value co-creation network, we are tasked with creating the psychological safety to reveal and challenge implicit biases.

Visual mapping (Figure 17) reveals that our co-creation body of Public Works would not be possible without the foundations of relevance and strategic value selling. These foundations have laid the

groundwork for our Public Works and have enabled *Customer Centric Organization transformation*. Our doctoral process has revealed the gaps in our practice and the means to address these gaps through integrated lateral and vertical development.

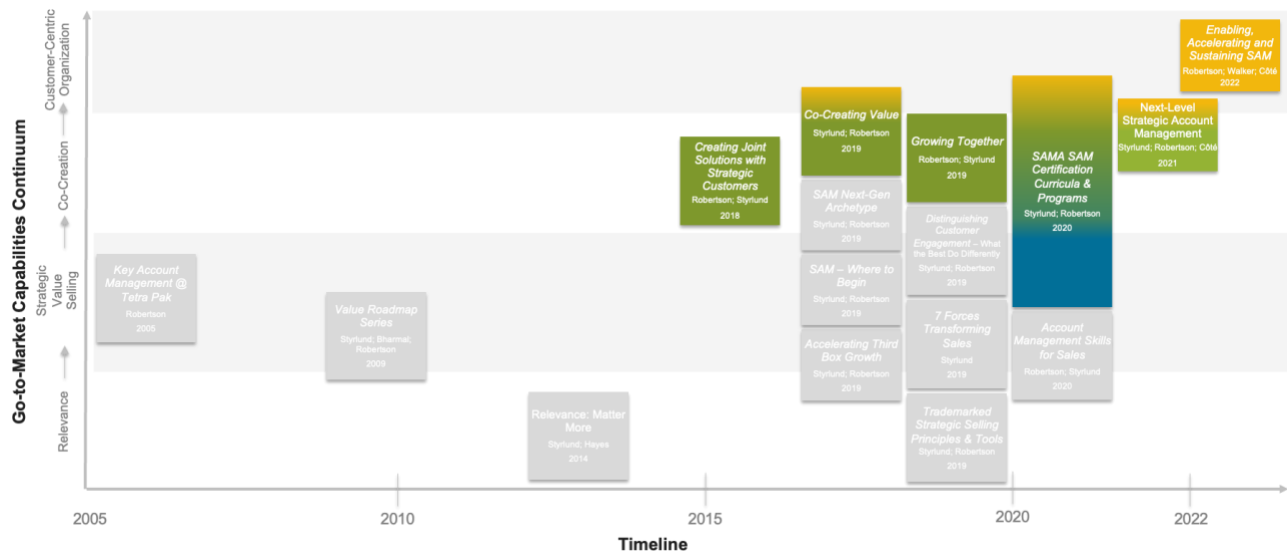


Figure 17: Value Co-Creation Public Works Timeline Mapped to a Go-to-Market Capabilities Continuum (Styrlund & Robertson)

3.5. Now What? Action to develop the sales professional and our firm

The process of critical reflection entailed by our work on the doctorate has had a measurable impact on our view of the sales learning and development industry and on our view of the future direction of our firm, The Summit Group. As we have critically examined our public works through the lens of character science and mindsets, we have identified key ways in which our industry is expected to change. The primary role of sales and account management in future is going to be to co-create and co-innovate differentiating value with customers, with a focus on addressing complex, meaningful opportunities, and challenges.

The traditional sales competencies, metrics, and horizontal means of training will not suffice to develop the sales professional of the future in the fourth era of selling. In fact, we contend that it will be ultimately fruitless to continue to operate solely under the assumptions of the time-honored, mechanistic, process and skills-focused sales training practices. While these practices have been

useful until now, we argue that they will, in isolation, be detrimental to sales performance in the future. We have observed a danger in top performing sales leaders to become reliant on tested ways of working and on their own limited perspective. Often an intellectual glaucoma sets in and creates blind spots in leaders' perception of reality and the future. These blind spots help to explain why companies continue to make substantial investments (over \$70 billion by US companies) in horizontal, process and skills-focused sales training (Cespedes & Lee, 2017) and have not, as yet embraced the paradigm of vertical development. Unfortunately, research suggests that most business leaders and sales professionals are unprepared in the essential areas enabled by vertical development, thereby creating a gap between the leadership we have and the leadership we need for the future (Ghemawat, 2005) (Weiss & Molinaro, 2005).

Horizontal development based on traits, skills, and transactional process improvement will not be sufficient for effective sales and sales leadership. We propose that the domain of vertical development theory will be key to sales leaders increasing their cognition, self-awareness, adaptiveness, capacity, and flexibility. A focus on vertical development will enable the transformational leadership of the future and will provide the means to close the widening development gap. Vertical development guides leaders beyond what they know towards understanding how they make sense of knowledge acquired. This difference in philosophy illustrates why despite significant investments in management and leadership education, companies still are not able to deal with the 'leadership crisis' in their organizations (Kegan & Lahey, 2009). Hannah Jones also points out the flaws in the current focus on skills, which is detrimental to individuals' personal development: These investments are focused too much on "skills individuals possess and insufficiently on the development of the individuals themselves" (2020).

While horizontal sales training and development will remain important, it is not going to be enough to succeed in the future world of sales. We anticipate there will be an increasing yet under-served demand for vertical development of next-level, transformative sales fluencies. We now strive to be the industry leader in the advancement of both horizontal acumen and vertical development. The combination of these two types of development will enhance the profession of sales:

- Horizontal development: subject-matter expertise and sales process skills and behaviors;
- Vertical development: interdisciplinary, creative, strategic, collaborative, co-creative, agile, and adaptive to increasing levels of authority and complexity.

Our doctoral journey and the insights derived from the critical analysis of our Public Works through the lenses of character science and mindsets have uncovered an urgent need for horizontal and vertical development of leaders and sales people. These types of development will be essential to the progression and professionalization of sales in the fourth, co-creation era of selling. The final chapter outlines our strategies to integrate vertical development and thereby implement our vision for the development of the sales professional and transformative fluencies of the future.

4. Synthesis, Conclusions & Reflection

In our concluding chapter we seek to:

- Articulate our thoughts regarding the future of the profession of selling and formulate a number of considerations regarding the role of sales and its impact on people, business, and society.
- Reflect on and synthesize the insights gained from the doctoral process that will fundamentally transform selling from a simple procedure of representing products and addressing customer needs to a complex process of facilitating value networks. We argue that this new sales role will not be possible without essential character habits (Integrity, Responsibility, Forgiveness, Compassion) and core mindsets (Growth, GRIT and Tactful Audacity, Proactive Creativity, Client-Centricity, Authenticity), as depicted in the Return on Character® Sales Value Chain.
- Outline a vertical sales learning and development framework that synergizes with traditional horizontal development strategies and tactics to shape the transformative selling fluencies required for the future.
- Reflect on the significance of the doctoral process in terms of our learning, our insights, and ourselves, as well as the future of our collaboration and our company.

4.1. Why the profession of sales will matter in the future

From a macro-perspective, we envisage sales as the interface between businesses, organizations, and people. We anticipate that sales will have an increasingly important impact on our political, economic, societal, and technological (PEST) environments.

The PEST analysis was developed over 50 years ago by Francis Aguilar, an American scholar with expertise in strategic planning. In the late 1960s, Aguilar published a book entitled *Scanning the Business Environment* in which the now widely used PEST tool was first identified (1967).

Using Aguilar's framework, we can situate the role of sales in the context of future changes to business and society. Using the PEST model to conceptualize the future of sales with regard to the political dimension, we perceive the current reality that business and corporations yield equal or ever greater influence than governments and countries. For example, the impact of the FAANG companies (Facebook, Amazon, Apple, Netflix, and Google) is detected across the political, economic, and societal domains on a global scale (Culpepper & Thelen, 2019). We argue that professional selling will play a major role in the emerging political landscape. It will act as a

connective tissue across industries and will provide a forum for dialogue and shared enquiry through which corporations and people will collaborate, cooperate, and innovate. Sales has the potential to mitigate the perils of an increasingly fractured society and gridlocked political process (Petranker, 2016).

In terms of the economic dimension, it is worthwhile to take into consideration Winston Churchill's reported axiom that business is the horse that pulls the social cart (Churchill, 1959). Phil's father instilled in him, at an early age, his belief that if you want to help the least, the lost, and the lonely of our society, there is no better way than to be part of a healthy business system. Business creates jobs, and jobs, in turn, generate taxes, which allow us to help the socially and economically disadvantaged. In addition to its economic advantages, work is a key component of dignity. In "Why Work?" Dorothy explores the psychological and biblical significance of the role of work in creating dignity as part of the grander purpose of life (2014). As well as a writer of fiction, Sayers is known for challenging Christians to transcend culture and transform culture through their everyday work ethic. Sayers felt that Christians lacked a biblical view regarding the purpose of work. As the daughter of an Anglican priest, educated at Oxford and well-versed in the arts and theology, her core message was threefold:

1. Work is a creative act and should be thought of as a creative endeavor based on a love of work itself. Given that man is made in God's image, he should make things for the sake of doing well something that is worth doing. Sayers observes that God, as Creator, makes things. Therefore, it follows from this argument that we should create to reflect the God who created us. Work is one of the many creative acts we undertake throughout our lives.
2. Work points us to our ultimate purpose. The Westminster Catechism teaches that man's chief end is to "glorify God and enjoy him forever." Work, Sayers argues, is one means by which we can achieve this chief end. Sayers writes, "I asked how work should be looked upon, not as a necessary drudgery to be undergone for the purpose of making money, but as a way of life in which the nature of man should find its proper exercise and delight and so fulfill itself to the glory of God" (1942, p.2).
3. Sayers observes there is no distinction between sacred and secular work. Sayers asserts that society has allowed work and religion to become separate departments. As a result, she finds that the secular work of the world is turned to selfish and destructive ends, and that the greater part of the world's intelligent workers have become irreligious or at least uninterested in religion.

Sayers asks, “But is it astonishing? How can anyone remain interested in a religion which seems to have no concern with nine-tenths of his life?” (1942).

Sayers views work as a creative act, one purposefully carried out as an act of worship and excellence. She argues that work can revolutionize how we view vocation and how we go about our daily tasks. In other words, she regards work as whole-life stewardship. Sayers sees work not as something we do to live but as something we live to do. Her legacy consists of a profound question regarding what would happen if we approached our work as a means to glorify God.

The societal dimension of the PEST model highlights the ongoing transformation from a post-COVID economy, profoundly altered by the pandemic, to an endemic, reshaped economic model. As part of this transformation, we detect the dramatically increased role of business in restoring our societal systems and order. We argue that as we look to a brighter future, the renewal of our global society will be led as much by business as by political and governmental institutions. Additionally, we see each day in our practice the significant role of business and work in aiding individuals in their recovery from the psychological and physical challenges presented by COVID.

The technological dimension of the PEST model reveals two different perspectives. First, technology will have a direct and substantial impact on sales. In terms of the interaction between suppliers and customers, digital omni-channel and AI will dominate the overall breadth of interaction and dialogue. The implications of these technological shifts include a decrease in professional salespeople’s human contact and face-to-face time with customers, and yet this interaction will matter more than it has in the past. In our practice, we have developed the concept of real-time relevance to articulate the attributes that salespeople will need to embody in this changed context. Real-time relevance describes the ability to be immediately relevant for stakeholders at any level, in any functional area, at any time. The key to this ability is to be focused on the customer’s interests. These interests can be described with the term Careabouts™. The new reality of the integration of human, digital, and AI interactions in increasingly complex and chaotic domains will represent the future landscape of sales. Technology advancement is now offering more solutions than customers can absorb. In many ways, there is solution fatigue, and an escalating need for human interaction (Hallowell, 1999) and real-time relevance.

In summary, our PEST analysis reveals some of the ways the sales profession will take on a role in shaping society and in orchestrating collaborative innovation on more meaningful, relevant solutions that are aimed at resolving wicked problems and capitalizing on opportunities. As we look at the future, we envision smart companies and highly effective salespeople leading trans-innovation, or transformative innovation, based on aligning and creating value networks. Leveraging a time-tested ethos of outside-in thinking will lead to co-creation and co-innovation for the future with a constellation of companies aligned around common market needs and requirements. This trans-innovation thinking will comprise the convening and facilitation of collaborative partners. This collaboration will be the mechanism by which the disruptive trans-innovation outcomes will be delivered. The mindset, trust, quality, and thinking of the partners in collaboration will create what we term wicked innovation.

Wicked innovation can be conceptualized by taking into consideration the chief characteristics of wicked problems, with multiple reasons and drivers (Rittel & Webber, 1973), and by inverting the logic to illustrate how wicked innovation can create dramatic sustainable market advantage because it is created by the unique collaboration and cooperation of partners across value networks. Consequently, the ability to replicate such innovation will be difficult, if not impossible, given the underlying principle of wicked innovation, which is that the how and the who matters as much as the what.

Character science and mindsets, the lenses introduced in our context statement, are fundamental in enabling the practice of trans-innovation. The character, quality, and trust of stakeholders and organizations collaborating in value-networks are profoundly significant factors. An immediate example of trans-innovation, as noted, is one in which we are currently involved: the transformation of the automotive industry from manufacturing and selling cars to mobility (See page 128). The mindset that will allow this collaborative to flourish is that of being customer-centric and tactfully audacious. A character-foundation of integrity and compassion will enable trust, trans-innovation, and full-spectrum transdisciplinary thinking. By harnessing these character traits, the collaborative will aim to be directionally right in the long-term, and executionally agile in the short-term.

We are observing initial problems as this new industry is forming in an uncharted, disordered world. First, there is a high level of confusion on the part of senior leaders in the industry about the

direction in which to guide their companies. Second, we see a paralysis of investment on the part of manufacturers and venture capitalists who are slow to fund because of conflicting perspectives on how the future will unfold. We anticipate that those firms that have the culture and mindset to focus on being fast-moving, agile, and roughly accurate in their predictions about the market will flourish as opposed to those that remain confined to the processes of the past and insist on viewing the future through the lens of past perspectives. This past perspective connects to many elements of our context statement, particularly with regard to our analysis of the differences between a growth and a fixed mindset, the seven forces of selling, and the new acumens and fluencies required to operate in this new world. It will be critical for companies to be fluid in developing their recognition and reward structures in addition to learning practices that empower this new type of collaborative value-networking, transdisciplinary, creative thinking, and agile action. In summary, the future of sales matters deeply. If business is the lifeblood of the global economy, then sales is the oxygen of the bloodstream.

4.2. Which of our Public Works most informed our conclusions?

Our conclusions and recommendations for the future of selling were shaped primarily by critical reflection on the three core clusters of our Public Works: Relevance, Strategic Selling, and Value Co-Creation. These three key areas of our Public Works gave rise to a number of significant insights:

- The realization that linear, horizontal development and mechanistic sales processes alone will be inadequate for the survival of next-generation sales people and organizations. More will be needed to achieve success and sustain customer-centric organization change in a complex, chaotic, and AI-enabled world.
- An awareness of the criticality of character science, mindsets, and vertical development in empowering the future of transformative selling.

The first body of Public Work is the book *Relevance: Matter More* (2014), our trademarked sales process, principles, tools, and related content. This book addresses a core challenge. It examines how people, companies, and brands remain relevant. The central thesis is that relevance matters as much or more than intelligence. People care about what a company or person has or knows only insofar as this knowledge relates directly to their issues, self-interest, or problems in a societal,

personal, or life context. Relevance as a mindset and practice is the bedrock of strategic selling and the basis for how we engage with clients. The book on relevance is framed by a quote by John Wesley and argues that relevance is best understood as the aim to be as relevant as one can, by all the means that one can, in all the ways that one can, in all the places that one can, so one can help as many people as one can, for as long as one can (2013). Our perspective on relevance is that to achieve an impact on people one must be relevant to them. People do not listen to those who are not relevant to them.

The second cluster of our Public Works focuses on strategic selling and account management process, learning, development, and enablement. These Public Works are articulated in the SAM/Strategic Selling curricula and the roadmap, as presented in the article “SAM, Where to Begin” and the corresponding curriculum construct of “Account Management for Sales” and the SAMA CSAM certification program (2023). These works represent the most complete and highest order compilation of content for the horizontal practice of strategic selling. The works now set the industry standard of strategic selling excellence and horizontal sales learning and development.

The third cluster of our Public Works is our body of work relating to co-creation. Our firm was integral to the development of the term co-creation. More importantly, we led on the development of a process and framework to execute the concept in the real world. In essence, co-creation is the alignment of the self-interest of two or more firms in a given market space through coaching, counsel, facilitation, ideation, and education. Harnessing processes and facilitating human collaboration, we are able to align the competencies, capabilities, and assets of these companies to create unique outcomes that would not be possible had the companies pursued these opportunities independently. Furthermore, co-creation is a type of mindset and, as such, is a core tool for addressing the mounting tide of wicked problems that exist in business, political systems, government systems, and society. Wicked problems do not have discernible solutions, and yet there are tools and strategies that can be deployed to achieve an impact. We argue that our body of work around co-creation is a major step forward and constitutes a structural antidote to wicked problems.

At the intersection of these three bodies of Public Works is our conviction that to achieve transformative selling in a future dominated by AI and wicked problems, it is essential for sales

professionals and organizations to embrace vertical development. It is apparent that customers no longer seek solutions alone. Customers are looking for guidance and trust-based direction, which implies that the messenger will be as important as the message. The essence of character science is that who one is matters as much or more than what one does. The growing importance of character is a fundamental part of this new sales landscape; this trend is of pivotal significance for the future of vertical development and helps to explain the role that such development will play in the future of sales, business, and society. Our intuitions regarding the centrality of character and vertical development amid these transformations of the workplace have had a profound impact on us and on our firm. The need for vertical development will now be one of the central drivers for the future direction of our consultancy firm, The Summit Group.

Furthermore, the intersection of our three bodies of Public Works illuminates the need for a new paradigm in sales training and development. The current prevailing model focuses on teaching and horizontal learning for the individual, or individual contributor. Yet the practice and results of sales today and in the future will be activated in a collaborative context through teamwork and inter-organizational value-networking. These findings from our doctoral work will now direct the future of our firm and our personal practices.

4.3. What learnings from the Doctorate had the greatest impact on us and why?

As we reflect on our doctoral journey, we conclude that the process has had a far greater impact on us than we expected. These impacts have been both unusual and transformative. The experience has prompted a structural reflection on both our lives and our works, which has allowed us to make sense of our past and to articulate a more productive and prosperous future. As we examine the mentors who have had the greatest impact in our lives, we recognize the wisdom of these individuals who have made sense of their lives. This doctoral program and the critical reflection we have conducted as part of it has contributed to our work with a process of self-examination, which has had a transformative impact on our practice. We have identified five key areas that have had the greatest impact on us.

First, we now have a far keener understanding of the concept of wicked problems (Rittel & Webber, 1973). Through our reading and research, we have refined our appreciation of the concept of

wicked problems and have begun to discern why the core concept is of increasing importance. As we delved into wicked problems, our research opened a new perspective on the problems and challenges that exist politically, societally, and from a business and sales perspective. In essence, the current state of our world is one that is dominated by wicked problems. This reality calls for a new paradigm of leadership in business, society, and politics. One of the learnings related to wicked problems is our recognition of the need to reinvent our relationship with complexity, which calls for a higher order thought model than the factors underlying the problem itself. This need for a new relationship with complexity will be reflected in the vertical development model for sales that follows in this chapter.

Second, our formulation of the core concept of vertical development encapsulates our intuitions and the knowledge gained from our four decades in business. The concept of vertical development has helped us to articulate the idea that the intellectual, moral, and psychological formation of a person matters as much or more than that person's abilities (Jones, et al., 2020). As a direct result of this doctoral program, vertical development will be our foremost consideration in taking our company to the next level in the industry of sales training. Our stated goal as a team is to be the thought and practice leaders in horizontal and vertical development for the future of professional selling. Our embrace of vertical development will help us fulfill our aspirations of professionalizing the sales industry. The framework for vertical development excites us because it provides a tangible and pragmatic roadmap for salespeople to see themselves, their companies, and the industry differently. Vertical development will enable salespeople to reinvent their relationship with complexity.

Third, we have gained a deeper understanding of reflective practice and appreciative inquiry. Reflective practice has given us a new lens and method for interrogating our own actions and engaging productively in a lifetime process of continuous learning. It allows us to achieve a better understanding of who we were, what we knew, and how we understood what we knew. Reflective practice has helped to illuminate our competencies and skills and the ways these attributes informed our consultancy practice. It honed our capacity to think about our thinking by looking at a situation, experience, or engagement and structurally analyzing to better understand how to learn from it and, in turn, to better inform our path forward. Once again, the concept codified our intuitive understanding of the situations we have encountered and brought clarity and structure by allowing

us to conceptualize and frame these situations and by helping us to incorporate them in our personal and professional practices.

Fourth, we developed a heightened awareness of the need of a new paradigm for training and development. This entire body of work has reshaped how we see the future of training and development for sales. The future will need to be oriented around collaboration and agile teamwork, across organizational boundaries both internally and externally. Our focus is now not only on elevating how individuals learn but also how they perform in a collaborative team context. These findings about the future of sales training have already reshaped our training content and will continue to transform the structure and nature of our training delivery in the future. These changes in our training practice require us to look differently at the type of talent that we bring into our firm and at their ability to embody this higher order of thinking and to educate others in its application.

Fifth, our work has been transformed by our exposure to transdisciplinary thinking. We have both been able to synthesize knowledge from diverse domains to create next-level ideas and concepts. Transdisciplinary thinking elevates this integral ability to make connections across disparate fields of knowledge. Transdisciplinary thinking has enabled our development of an integral thought framework, which will define the most successful and impactful sales professionals of the future.

Phil has been part of developing a “seeing things whole” construct for his undergraduate alma mater, Augsburg University, in Minneapolis. In this endeavor, he has identified three dimensions of a transdisciplinary “seeing things whole” thought platform. These three dimensions are identity, purpose, and stewardship. Identity examines who we are. It prompts use to consider what we value and why we are here. Purpose obliges us to reflect on the nature of our mission. It asks what we serve, how we serve them, and, most importantly, why we serve them. Seeing things whole compels an examination of stewardship and of our commitment to sustainability. It requires us to scrutinize how we acquire resources, how we nurture those resources, and how we sustain those resources.

Overall, seeing things whole looks at the larger questions of the role of sales and business in community and society. It comprises an examination of our network and whether it is sufficiently robust to carry out the mission; it also considers whether the mission is sufficiently important to

warrant the community that we have engaged. Seeing things whole is a transdisciplinary acumen that looks at how organizations shape the character and quality of life by creating an environment that reflects the core values of the constituents and draws on the full potential of employees and team members. A holistic perspective also requires that corporations maintain a clarity of mission and vision by focusing on the type and quality of products and services they provide and by attending to how well customers and societal needs are served. Finally, this perspective challenges organizations to acquire and sustain resources for their mission by managing the effective and appropriate use of them and by monitoring the care of resources to sustain vitality.

The “seeing things whole” model embraces the paradoxical nature of competing forces within organizational decision making. The model represents both complementary and opposing forces and focuses on our ability to benefit from these tensions in our cultivation of wisdom. It counterpoises simplicity against the prevailing complexity that characterizes our world. The “seeing things whole” acumen might be conceptualized as a process for creating a “historically based future.” We have developed an actionable model by which leaders can bring a focused challenge to a roundtable process and bring other leaders and their perspectives to consider this challenge. In essence, the “seeing things whole” model can be thought of as crowdsourced wisdom focused on an intractable challenge. It begins by identifying a current unresolved question facing an organization and that is critical to its future.

The core queries aligned with the identity of the organization include an interrogation of whether there is clarity in the values that shape our relationships, our service to others, our life, and our career. Furthermore, clarity is necessary with regard to our gifts and talents and our commitment to using them for a grander purpose. We must seek to connect our own journey to that of others who can offer support. We also need to be clear about how our values align with group values in the organizations of which we are members. It is worth reflecting on whether we are known for our character, integrity, and honesty and whether we celebrate our achievements and see our failures as an opportunity to learn and grow. In order to understand the extent to which we are committed to our own growth we must examine whether we are living to our fullest potential.

The core queries relating to purpose include an examination of our commitment to placing trust in others in the course of our search for purpose in life. Furthermore, we must scrutinize how this

purpose reflects our values and the ways these same values inform our decision making in life and business. The queries that relate to organizational purpose comprise an exploration of our dependable strengths and core values. Our purpose needs to be clear that it provides energy and focus for individual and collective action. We need to interrogate whether the empowerment of others is something we hold deeply and whether we are open in sharing information with others in a way that empowers them to act and that encourages collaboration and partnership. The search for purpose entails an acceptance of criticism and an endeavor to grow from our mistakes. We must assess our impact on the well-being of the wider human and natural world and adjust our mission and performance accordingly. We must examine the ways in which we continually strive to improve how we serve customers through what we create and provide for them. Finally, purpose depends on an assessment of the value we place on our products and services as a resource that is important to us as well as to our customers.

Finally, our queries that relate to the broader topic of stewardship are associated with the role of selling and business. These queries include attention to how our resources convey our understanding of them as a precious and sustainable inheritance for future generations. Stewardship involves ensuring everyone has a chance to be heard on issues in which they have a stake. The “seeing things whole” concept is a concrete expression of transdisciplinary thinking applied to a business and selling context. It is a concept that models transdisciplinary thinking to address intractable problems, i.e., wicked problems, and equips people with the ability to utilize the model to address real world problems, both in the public and private sectors for the sake of the common good.

4.4. The way forward for the professionalization of sales

While it is clear that organizations will continue to exchange goods, services, and solutions as they have since the first era of selling, the future role of sales in this process is less obvious. Despite its reputation and historical importance, the role of sales in an AI-enabled, digital, information-overloaded, omni-channel world, might be considered outmoded and in need of redefinition. Redefining the role of sales in this new era of selling will ensure future relevance and provide a basis for future-proofing sales as a profession.

The sales industry appears to be grappling to define the role and characteristics of the next-generation sales professional, as evidenced by emerging descriptors including:

- Sense making sales (Gartner, 2022);
- Omnichannel buying-journey orchestrators (McKinsey & Co., 2022);
- Customer obsession (Forrester; Amazon, 2022).

Suggested ways of developing the sales organizations of the future appear to emphasize primarily the methods of the past with their focus on sales process, skills, and tools. The only adaptation to the new environment in which sales operate is a consideration of how these processes, skills, and tools will be digital, data-enabled, and more agile (Korn Ferry, 2022). For example, one leading consulting company advocates that “sales organizations need to rethink and transform how they engage with the customer – through their go-to-market strategy, their approach to talent, their sales structure, process, and methodology.” This prescription for the future is not far removed from the advice given over the past quarter century.

The process of reflecting on and interrogating our past Public Works has revealed an industry-wide neglect of the future role of the sales professional and of the thinking, strategies, and tactics required to develop next-generation sales capabilities. Insights gained in the course of developing our Context Statement highlight fundamental shifts in the selling environment. In this context, we have uncovered the essential role of vertical development as a key enabler of transformative thinking applied to wicked problems in the B2B supplier-customer ecosystem. As a result of these insights, we are able to capitalize on this opportunity to collaborate in creating awareness, in challenging prevailing thinking, in mapping out a path forward, and in engaging sales and learning leaders in conversations on important questions such as:

- Why should the sales profession invest in vertical development?
- What might a framework for vertical development of the future sales professional (and selling team) look like?
- How can sales organizations and people assess current levels of vertical development?
- What learning and development strategies and tactics will be most effective in developing sales people both horizontally (process and skills) and vertically?
- How will vertical development for sales measure progression, outcomes, and impact.

4.4.1. A framework for vertical development for the future of sales

Our doctoral journey and perspectives gained from the analysis of our Public Works through the lenses of character science and mindsets have exposed an urgent need for horizontal and vertical development of leaders and sales people if the function is to progress and professionalize in the fourth, co-creation era of selling.

Horizontal learning can be conceptualized as an expansion of knowledge that builds subject matter expertise, competencies, and acumens. Vertical development comprises an expansion of human depth, power, and processing capability. The ability to draw on both of these types of development provides greater impetus to address the problems and opportunities of the future. The combination of vertical and horizontal development provides a more nuanced type of personal and professional thought for the sales profession.

Most horizontal-focused training is based on assessing past and current competencies. However, a unique focus on horizontal development leaves sales professionals ill-equipped for the future. Given the rise of digital commerce and omnichannel expansion, the sales professional may have less face-to-face interaction, and yet the criticality and relevance of the interaction will be vastly elevated. On one hand, horizontal development helps individuals perform tasks using expertise and technical competencies. On the other hand, vertical development empowers them to apply their expertise in new and changing environments. Vertical development strengthens a person's ability to put their horizontal training into practice.

Although we have not focused explicitly on horizontal development in our past Public Works, we have become convinced of the urgent need to integrate vertical and horizontal development as a means of enabling integral, transformative learning. Such learning transforms the whole person: it expands the vessel of knowledge itself and does not merely serve to fill the vessel. Vertical development can be conceptualized more expansively as the act of building depth with a focus on one's internal operating system. Vertical development implies a process of true self-reflection and is thus hampered by fear of introspection. John Gardner observes the innate human tendency to avoid such introspection: "Human beings have always employed an enormous number of clever devices for running away from themselves. We can keep ourselves so busy, fill our lives with so many diversions, stuff our heads with so much knowledge, involve ourselves with so many people

and cover so much ground that we never have time to probe the fearful and wonderful world within. By middle life, most of us are accomplished fugitives from ourselves” (1990, n.p.).

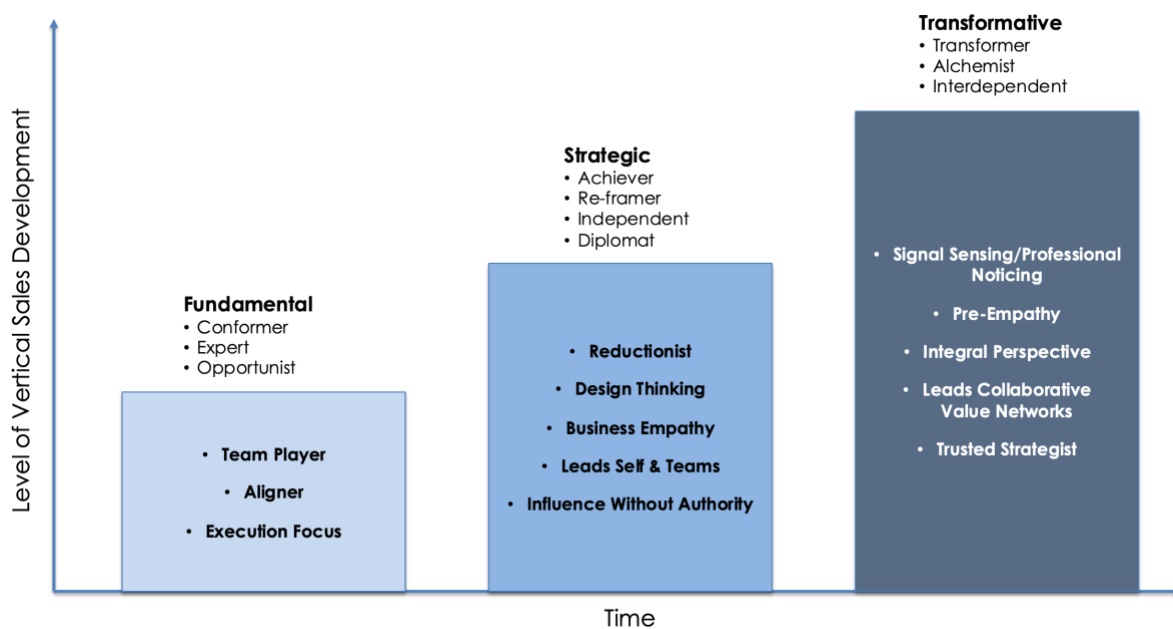
Vertical development guides learning and personal growth through stages of increasing social, emotional, and mental sophistication. This growth shapes how a person interprets and interacts with their environment (Cook-Greuter & Miller, 1994; Kegan, 1982; Petrie, 2014; Torbert, 1987). With each stage of development, individuals acquire increasingly multifaceted and comprehensive perspectives. This type of development contrasts with established horizontal learning, which focuses on the development of skills and abilities from a technical perspective and enables problem solving through logic, linear process, and techniques in an ordered environment (Petrie, 2014). The work on vertical development infrequently crosses disciplinary boundaries and has not been widely integrated into leadership development, and is barely evident in sales research, learning, and application. Models of adult vertical development permeating leadership, including Kegan’s ‘Orders of Consciousness’ and Torbert’s ‘Action Logics’ (Jones, et al., 2020), have transferable application to development of the future sales professional.

Kegan refers to stages of vertical development as orders of consciousness and identifies five distinct levels of development: impulsive mind, imperial mind, socialized mind, self-authoring mind, and self-transforming mind (1982, 1994). Progressing through higher orders requires a more sophisticated sense of self in relation to others and their perspectives. People at higher levels of development have a greater ability to learn and to solve complex problems. They can question their own assumptions about the world and are more likely to accept paradox while remaining centered and confident in their ability to take action. Based on two studies involving sentence completion testing (SCT) and the Subject Object interview (SOI), Kegan (1994) claims that less than thirty-four per cent of adults reach the fourth order, while three to six per cent are in various phases of transitioning between the fourth order and fifth order. No individuals in Kegan’s study had fully attained the fifth order (Jones, et al., 2020).

Torbert’s action logic model defines seven levels of leadership: opportunist, diplomat, expert, achiever, individualist, strategist, and alchemist. The levels are distinguished by differences in how a leader perceives the world and processes information. An opportunist sees the world through a lens of power and seeks personal gain. Alternatively, an alchemist moves away from viewing the

world in artificially segregated categories and begins to understand the complexity and temporal nature of events (Torbert, 1987). Similar to Kegan's orders of consciousness, research has found only four per cent of the studied population had reached the strategist level, while less than one percent attained the alchemist stage (Rooke & Torbert, 2005).

While there are multiple instruments to assess and develop horizontal sales practices and learning, to our knowledge there are no such instruments, frameworks, or curricula focused on vertical development for sales people. Informed by the work of Kegan (1994), Torbert (2005), and Petrie (2015), as well as by Keil's research into character (2014), we have developed a prototype framework that enables assessment and guides development of sales people and organizations through three stages of vertical development. These stages evolve concentrically outward, in the same way as rings on a tree trunk, from fundamental to strategic and, subsequently, transformative. The ability to integrate vertical development with traditional, widely used horizontal sales skills and competency frameworks will enable learning leaders to gain a more holistic perspective on the sales person. Employing vertical development in conjunction with horizontal sales training will provide for a more integrative and sustainable approach to learning and practicing in the selling profession.



This model combines the thinking of Kegan, McGuire, Rhodes & Petrie

Figure 18: Stages of Vertical Development Framework for Sales (Styrlund & Robertson)

Our insights into vertical development provide the opportunity to integrate vertical development more consciously into our proven horizontal practices. The effective integration of vertical development will allow us to create cohesive learning strategies and curricula. Learning from the application of vertical development in leadership, we seek to develop strategies and practices that learning organizations can employ to enable sales people's vertical growth. These vertical learning strategies will need to integrate with horizontal skills; they will also need to be pragmatic and be capable of being applied in the flow of work to empower meaningful and sustained change.

Integrating vertical learning into professional sales development will require fundamental shifts in thinking and culture. The learning strategies designed to promote these new capabilities will also entail progression in how proficiency is measured in this area. How our interventions are structured and the nature of the services we offer and enable, create a new set of expectations about time to competence in these domains. For example, time to competence in a new skill, technique or process may be relatively quick and predictable across a wide sub-set of sales professionals, while growth in mind-set and progression through levels of consciousness has been shown by Kegan to take many years, or even stall.

These changes will be needed at three core levels:

1. First, how enterprises view the future role of sales people, and how they enable, develop, and measure sales learning;
2. Second, how academia, our consulting practice, and sales training organizations enable sales, marketing, and account management learning. These institutions will need to transform mechanistic and linear processes, focused on activities, outcomes, and metrics into a multi-dimensional, integrated horizontal and vertical learning approach that sees the sales person, and ecosystem in which they operate, holistically.
3. Third, on an individual level, sales professionals will need to rethink their role and how they learn and grow by integrating both horizontal sales skills development and vertical learning. As part of this shift to a vertical learning framework, they will need to reconceptualize their development as a movement through stages of action-logic, or orders of consciousness.

We anticipate that each individual stage of development will either accelerate or inhibit the enterprise, consulting organization, academic institution, or sales professional. The ability to progress will be dependent on capacity to embrace new ways of thinking and being. And will also depend on the starting point in terms of orders of consciousness of the participants. If someone is already in transition from Kegan level-three, movement may be accelerated through coaching and structured challenge. However, if someone is stalled in level-three, and has been so for a number of years, it may take an extraordinary effort to move to the next level of consciousness. In reality, someone operating at Kegan's level-three could be a top performer as a selling era two, or even as an era three, sales professional.

We are initiating a transformational approach to drive and sustain a cultural shift toward integrated vertical and horizontal sales learning within our practice and within clients' organizations. This transformational approach is constituted by five iterative stages (see Figure 19 below):

- **Envision and roadmap:** Establish a shared vision, objectives, strategies, and roadmap, including time and resources, to realize the potential of vertical learning for sales, which will be amplified with a sense of purpose and urgency.
- **Identify lighthouse clients and equip champions:** Identify and engage early adopter, trail-blazing clients and equip champions of vertical learning transformation.
- **Realize early wins, learn, and adjust:** Deploy early experience initiatives, capture insights for our learning, and subsequently make adjustments to our methods.
- **Integrate vertical learning capabilities and elevate them:** Deploy integrated vertical and horizontal learning paths, which will enable the building of next-generation sales capacity and capabilities.
- **Scale and sustain impact:** Remove barriers to the progress of this cultural learning shift by creating conditions for success through continued application and the use of coaching to measure impact, scale up, and sustain the initiative.

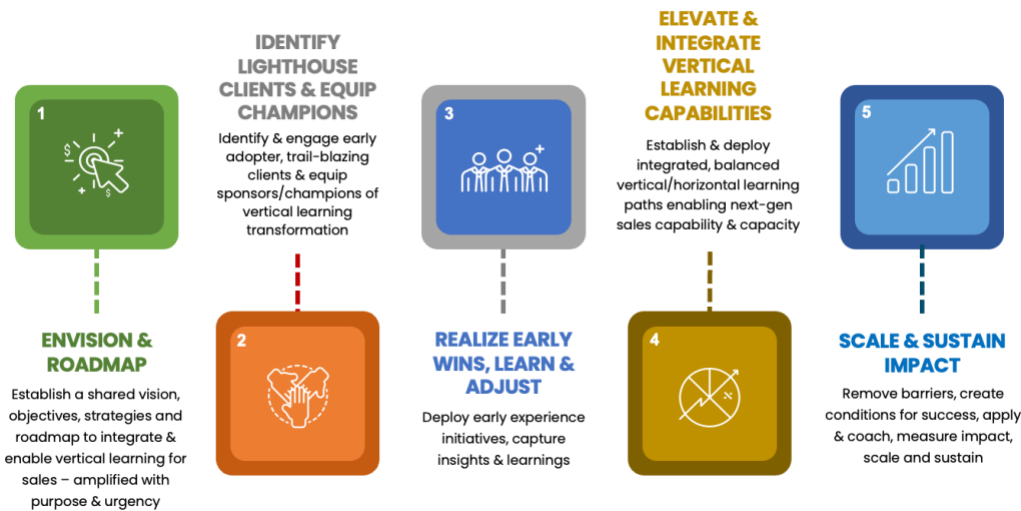


Figure 19: Vertical Sales Learning and Development Transformation Roadmap (Styrlund & Robertson, 2023)

This transformational journey is grounded in Snowden's Cynefin Framework (2023) for addressing complex, or wicked problems. The framework will enable us to probe new opportunities for development through experimentation, evaluation, and repetition. We will sense new opportunities by embracing the unknown and determining next steps and subsequently respond in collaboration with thought-leading clients who are prepared to invest in a longer-term view. We will build relationships with clients who recognize the potential of an integrated, balanced, linear, and vertical approach to sales learning and development. We anticipate that many of our clients will appreciate the risks of continuing along the traditional sales training path currently in operation.

Our new approach will be co-created with clients and academia at every step. It will be guided by emerging patterns in the unordered, complex, AI-enabled fourth era of selling. Progress will demand new ways of thinking and being, as well as evidence of success measured by traditional and new metrics for sales learning and performance. We envisage that academia will play a crucial role in developing vertical sales learning capabilities because of the pressures on businesses, which are driven by near-term shareholder expectations and quarterly reporting and therefore tend to lack the organizational patience and longer-term perspective required for vertical development.

Vertical development strategies will need to adapt to the learner's current level and will have to take into consideration their personal stage of development (both vertical and horizontal). Our sales learning, development, and consulting practice will foster personal and professional growth

in salespeople. They will thus be empowered to develop their thinking and their ability to adapt to complex situations in order to improve their overall capacity and performance. Our integration of a vertical development focus will expand on the individual's cognitive and emotional capacities to increase sales effectiveness in an increasingly complex, chaotic marketplace.

Our framework of vertical sales learning enablers builds on Petrie's primary conditions for vertical development (2022). Associated with three key learning strategies, these enablers can be integrated with horizontal knowledge and skills interventions to create holistic and tailored learning journeys that are designed to accelerate the progression of sales people through fundamental, strategic, and transformative levels of vertical sales development (as outlined in Figure 18).

Vertical learning strategies can be adapted and reconfigured to take account of more complex and sophisticated ways of thinking, which can accompany the horizontal development of information, skills, and competencies. The integration of both types of learning mitigates against the creation of learning strategy silos. This new approach to developing sales people will demand both/and, rather than either/or thinking and practice (Smith & Lewis, 2022).

Our firm's approach to vertical sales learning and development strategies will integrate:

- Stretch immersions;
- Connected cognitive diversity;
- Insights-to-action.

#1 Stretch Immersions	#2 Connected Cognitive Diversity	#3 Insights-to-Action
Real and simulated experiences that challenge embedded biases and accelerate new ways of thinking, being and doing	Integrates shared knowledge and perspectives from multiple disciplines to address shared-interest complex problems facing sales professionals, account managers & customers	Equips sales professionals and customer teams to make connections between insights and focused action that drive impact and results [Closing the knowing-doing-impact gap]
Immersive Simulations, "Real Plays" & Experiential Learning Immerses learners in complex situations that disrupt and disorient habitual ways of thinking	Communities of Practice Facilitates dialogue and the exchange of ideas and insights both within and across sales and account teams	Vertical Development Assessments Mechanism to reflect on one's current state, with a view to gaining new insights that will guide future learning and development
Reflective Practice & Collaborative Coaching Equips sales managers and leaders to challenge assumptions, amplify the interaction between ideas, mindsets, and people, and to engage in collaborative coaching conversations that require a shift from telling to asking	Transdisciplinary "Learnscaping" Nurtures an environment that enables multi-function, cross-business dialogue and trans-discipline learning in a psychologically safe space	Framework Thinking Structured thinking approach to sales/client problem-solving, and understanding complex situations, breaking them down into smaller and more manageable components enabling action
Structured Storymaking Guides account teams and sales professionals to co-create stories with their peers, team members, and customers	Design Thinking & Business Empathy Guides individuals to look at situations, opportunities, and challenges from another person's perspective, thereby revealing new insights	Cognitive Workouts Integrate design thinking, structured dialogue, cognitive diversity, and peer coaching to creatively address real-world customers' challenges and activate "wicked innovation"
Stretch & Challenge Assignments Provokes sales professionals to expand beyond their comfort zone	Cocreating Collaborative Value™ Brings together executives from supplier and customer organizations to align, ideate, and activate joint solutions with focus on co-creating value for the customer's customer	Self-Guided Action Planning A vehicle for activating insights derived from assessments

Figure 20: Sales Vertical Development Strategies & Tactics (Styrlund & Robertson)

Stretch immersions entail real and simulated experiences that challenge embedded biases and facilitate new ways of thinking. Petrie suggests that leaders are reluctant to abandon the status quo and that their action habitually remains oriented in the same direction, unless they are compelled to change that state by external forces acting upon them (2022).

Diagnostic assessments, dedicated time for reflective practice, and a deeper level of developmental coaching, are woven into these immersive learning experiences. This is not performance coaching as practiced by many organizations, and, in some cases, may require specialist psychological interventions, as well as exceptional and consistent role modelling. Progress can be instantly undone by insensitive leadership that does not value the developmental journey, which, we anticipate, will not always be a smooth upward trajectory.

The combination of these activities provides the opportunity to practice double-loop learning (Cartwright, 2002) that contests underlying assumptions, values, and beliefs. The adoption of these stretch immersions – and their potential impact – is contingent on the organization’s tolerance for risk taking. Organizations that embrace a “growth mindset” culture that rewards smart risk-taking in the pursuit of growth are better placed to capitalize on stretch immersions. The default culture, which encourages people to opt for safe and low-learning projects, is inimical to stretch immersions. Medtronic offers an example of successful stretch immersions with its recently introduced “Medtronic Mindset”, which aims to foster cultural norms that deliver results in an ethical, compliant way. “Acting Boldly” is one of the company’s espoused mindsets that encourages risk-taking with the right intent and reasoning (2022). This underpins the criticality of Kegan’s core concept of the Deliberatively Developmental Organization (DDO) (2016).

To activate stretch immersions, we draw on our own extensive experience and that of our partners, Consalia, KRW International, and Whetstone. Our combined expertise encompasses the following areas:

- **Immersive simulations, “real plays”, and experiential learning**
- **Reflective practice and collaborative coaching** to challenge assumptions and amplify the interaction between ideas, mindsets, and people (Argyris, 1977). This practice equips first-line sales managers and sales leaders with the skills to engage in collaborative coaching

conversations that require a shift from telling to asking. These conversations create a psychologically safe environment that empowers courageous learning, insights, innovation, and action.

- **Structured story-making** to guide account teams and sales professionals in co-creating stories with their peers, team members, and customers. Story-making transforms thinking and behaviors through narrative transportation and through its resonances with our values and belief systems.
- **Stretch assignments and challenges** to encourage sales professionals to expand beyond their comfort zone (Page, 2020). Examples of these activities include:
 - Facilitating co-creation sessions with internal business partners and key customer stakeholders;
 - Leading high-performing customer teams to protect, win, and grow business with complex, key accounts by elevating influence without formal authority;
 - Accelerating vertical acumen growth through stretch assignments that utilize a transdisciplinary approach that integrates knowledge from diverse, cross-matrix domains, including sales, marketing, design, technology, innovation, and customer experience.

Furthermore, stretch immersions heighten the development of emotional intelligence and teach sales professionals to recognize and manage their emotions. The practice of empathy, active listening, and effective communication to build rapport and accelerate trust with customers are key ingredients in this process.

Connective cognitive diversity is the second core vertical learning strategy. It builds on Dr. David Adam's thinking on transdisciplinarity and embraces cognitive diversity (2023) to integrate shared knowledge and perspectives from multiple disciplines to address complex problems facing sales professionals, account managers, and their customers.

In deploying this learning strategy, we see the notion of “connectiveness” as an important way of mobilizing different stakeholders around a shared sense of purpose and mutually beneficial outcomes. Engaging with stakeholders in this way, according to Senge (1990), can lead to a broader and more inclusive vision.

In the context of sales and account management, transdisciplinary thinking can be applied to address wicked problems and promote co-creation between salespeople and their customers. This learning strategy mitigates the risk of collective myopia when people with similar experiences and thought patterns cluster around a small part of the problem (Syed, 2021) and develops adeptness at moving between and beyond the perspectives of different disciplines. By applying transdisciplinary thinking in the context of addressing wicked problems and co-creation in sales and account management, organizations can create more innovative and effective solutions that meet the complex and evolving needs of their customers.

Learning strategies that actuate *connective cognitive diversity* include:

- **Communities of practice** that facilitate dialogue and the exchange of ideas and insights both within and across sales and account teams (Wenger & Snyder, 2000);
- **Transdisciplinary “Learnscaping”** (Adams & Sutton, 2020), which captures Shön’s reflection in action (1983), and creates an environment that enables multi-function, cross-business dialogue and learning. The sharing of perspectives and collaboration facilitates co-creation which nurtures more innovative and effective solutions that meet the complex and evolving emotional and rational needs of their customers.
- **Design thinking and business empathy**, which guides individuals to look at situations, opportunities, and challenges from another person’s perspective, thereby revealing new insights. In this context, we endorse Dr. Julia Sloan’s guidance on suspending solving and slowing down to listen longer (2017).
- **Cocreating Collaborative Value™** is a long-standing area of practice in The Summit Group. It brings together business executives from supplier and customer organizations to align, ideate, and activate joint solutions designed in response to mutual priorities, with a focus on co-creating value for the customer’s customer.

Our collaborations with a number of organizations illustrate the application of connective cognitive diversity:

- The *Cox Automotive University’s SHIFT - Reinvent* leadership development program brings together cross-industry executives and external thought-leaders to nurture their organization’s culture, accelerate employee engagement, and create environments for both short and long-term success (2023).

- The *Johnson & Johnson's Hospital Leadership Symposium* was designed to facilitate the transition of hospital leaders to value-based care through a structured exchange of knowledge, ideas, and best practices from pioneers across and beyond healthcare (2019).

Insights-to-action is the third vertical learning strategy. It works by improving salespeople's reflexivity and capacity to think more critically and creatively when problem-solving, decision-making, and activating strategies in dynamic operating environments. This learning strategy equips sales professionals and customer teams to make connections between insights and focused action that drives impact and results.

Our vertical development practice is grounded in thought frameworks and models that help sales professionals expand beyond their comfort zones, learn from their real-world experiences, and experiment with new approaches. Promoting self-awareness, reflection, and introspection offers a route to enhancing our understanding of our signature strengths, opportunities, and motivations. This development is enabled by tools and exercises that promote insights, such as assessments, 360-degree feedback, and journaling. Overall, we will encourage continuous learning by establishing a culture that provides access to resources and developmental opportunities such as online courses, micro videos, workshops, and sales industry thought-leadership conferences.

Learning strategies that stimulate *insights-to-action* include:

- **Vertical development assessments** that provide a mechanism to reflect on one's current state, with a view to gaining new insights that will guide future development. An excellent example is KRW's Return on Character® (ROC) Assessment that proposes four characteristics of leadership defined by observable, measurable behaviors – integrity, responsibility, compassion, and forgiveness – and determines the gap between a leader's intent and that leader's reputation in the community (2023). Another example is Richard Hughes-Jones's approach to assess stages of vertical development (2023).
- **Framework thinking**, which derives from the insight that an individual builds on the underlying structures that have already been put in place. The Summit Group is known for "framework thinking" as an approach to sales, problem-solving, and understanding complex situations by breaking them down into smaller and more manageable components. Our

methodology guides sales people to organize information, generate new insights and ideas, and apply structured thinking to identify patterns, relationships, and potential solutions.

- **Cognitive workouts** that integrate design thinking, structured dialogue, cognitive diversity, and peer coaching to creatively address real-world customers' wicked challenges.
- **Self-guided action planning**, which was developed by KRW as a vehicle for activating insights derived from Return on Character® assessments.

While we anticipate the need for new ways to measure vertical sales development, we recognize the primary metrics for sales, such as sales revenue, growth, share, acquisition, and customer loyalty, will remain. Investment in vertical development will need to demonstrate its impact on these traditional key performance indicators in sales. At the same time, vertical development will also introduce new vertical measures of success, progress, and performance. To evolve towards the transformative level of an alchemist, sales professionals will need to curate a lifetime thought model that is adapted to the future demands of the profession and customized to how they think. This thought model will represent an authentic template of their cognitive processes and will be intuitive, comfortable, and able to become part of their brand.

As we develop our firm's capabilities we will champion these vertical development strategies in our work and client engagements. Overall, we seek to create a transformative, integral approach to sales learning that represents a more holistic emphasis on personal growth and development, combined with mastery of selling and account management in the fourth, and subsequent, eras of selling. By incorporating these learning strategies, we believe this next level of integral selling can create a more effective and sustainable sales learning and development process that benefits the salesperson, the company, the customer, and wider society.

4.4.2. The role of trust and ethics in the future of sales

As the sales role evolves in the fourth era of selling, it will be tasked with orchestrating collaborative value co-creation across ecosystem networks. This collaborative work will necessitate an ongoing process of building and sustaining trust, which will become the most important part of the foundations of the profession of sales. Trust and ethical behavior are dependent on character; trust

is in fact an outcome of character (Johnston, 2016). In a digital, AI world, we anticipate that trust-based selling will become the new source of business competitiveness and differentiation.

4.4.3. The need for transdisciplinary thinking for the future of professional sales

Transdisciplinary thinking is driven by a number of core elements. First, the ways in which we organize ourselves reveals the interconnectedness of human systems and communities. The structure and function of organization and decision-making have an impact on our environment, our markets, and our customers. Second, our geographical and temporal location shapes transdisciplinary work. Our orientation with regard to our personal histories, journeys, and discoveries underscores the relationships and fundamentally interconnected nature of individuals, societies, and cultures. Third, the ways in which we view and express ourselves have a bearing on transdisciplinary thinking, which examines our emotions, culture, beliefs, and values.

Transdisciplinary thinking looks at how we reflect on and extend our creativity. Fourth, transdisciplinary thinking furthers our understanding of how society and business interact. It constitutes a personal inquiry into the natural world and its laws, the physical world, and the interaction between human beings and societies. It looks at how human beings understand scientific principles and the advancement of science and technology. Finally, transdisciplinary thinking scrutinizes identity, underlying structures of beliefs and values, and psychological, social, and spiritual health. It explores human relationships, including family, communities, friendships, companies, cultures, and customers. In essence, it explores what it means to be human.

The need for interdisciplinary thinking arises from the nature of complexity in society and ourselves. Problems are complex when their multiple parts require analysis from a variety of different perspectives. Because of their regimented and isolated nature disciplines and fields of knowledge fail to appreciate these interactions and make them their object of study. A recent example of the potential value of transdisciplinary thinking arises from the US challenge with illegal immigration. It is a complex wicked problem because it has multiple parts. Each of these parts is being viewed and studied by a different discipline. However, studying the elements of a problem in isolation from others and overlooking the interactions of these elements does not aid our understanding of the causes or effects of illegal immigration. What is required is transdisciplinary thinking that views the subject as a network of complex systems with multiple interacting parts. Transdisciplinary thinking

analyzes the relevant insights in a search for common ground among them and with the aim of producing more comprehensive understanding and proposing a more holistic solution.

There are many factors that explain the need for transdisciplinary thinking: first, the complexity of the globalized marketplace; second, the complexity of society, business, and ourselves; third, the heightened need for systems thinking and integral contextual thinking; fourth, the current state of the world and its pressing needs; fifth, the social demand for both disciplinary and interdisciplinary dialogue. Effective communication requires sensitivity to diverse cultures. The need to understand the cultural complexity that characterizes our world is more urgent than ever with a growing world population and the strain of limited resources. In the context of a new globalized workplace, there is the question of the types of knowledge and perspective needed by professional sales people and business people to thrive.

Globalization and technological advancements in the first part of the twenty-first century have profoundly altered different professions, industries, institutions, products, and services. These step changes have created new markets and new political, economic, and social realities. This confluence has elevated the level of skill required to obtain and retain work. These changed economic realities have fundamentally increased global competition for numerous professional roles. There is a core restructuring of the global economic system underway, which demands a new type of worker with new sets of skills and a curated personal thought model. The salesperson of the future needs to integrate technological knowledge and practices with an ability to collaborate with people from diverse cultural backgrounds and with diverse educational and disciplinary backgrounds. This person must be able to work with ambiguity and intangibles to produce tangible outcomes, products, and solutions. Most solutions are the result of integrating information from multiple and diverse knowledge domains and require working in teams.

The world of sales and business is becoming increasingly transdisciplinary because business transactions occur in a progressively fast-paced and complex environment that demands interdisciplinary skills to address this complexity. Among these skills is the ability to integrate knowledge from multiple sources. Jan Rivkin (2000), a professor from the strategy department at Harvard Business School, has identified the crucial need for integrative skills in the future business person. Integrative skills can identify the core of an innovative strategy and grasp the implication for

other parts of the company. Such skills can help to build out the idea until it permeates the entire value chain of the company. For example, an integrative sales perspective would be able to envisage how improvements in a retailer's information system have implications for store location, store manager autonomy, pricing policy, and vendor relations.

Transdisciplinary thinking also reflects the need for systems thinking and contextual thinking. Systems thinking is the ability to break a problem down into its constituent parts to reveal internal and external factors. In this regard, systems thinking can be likened to first principle thinking. This type of thinking helps one learn how each of the parts relates to the others and to the problem as a whole. It helps to identify which parts influence the outcomes. The ability to analyze systems is therefore a key feature of the complexity of the future role of sales. In addition, salespeople of the future will need to be prepared to apply contextual thinking to address contextual problems and to create integral solutions. Contextual thinking is the ability to view a subject from a broad perspective by placing it in the context of time, culture, and personal experience. This type of reflective judgement, which focuses on interdisciplinary and transdisciplinary thinking, is characterized by an integrative view of the relationship between parts thereby promoting intellectual growth and critical thinking (King & Kitchner, 2002).

There will be a critical need for transdisciplinary thinking sales leaders in the future. Future sales leaders will need to have a broader portfolio of skills. They will need to be learners and will have to be comfortable with a continuing stream of change. They must embrace new digital technology and will need to lead with purpose, clarity, and passion. These leaders will require exceptional people and EQ skills. They will need to be able to attract, retain, and develop top talent and build diverse teams. They will need to develop a strong talent pipeline and will have to integrate expertise from other disciplines. They will possess strong critical thinking skills and will be adept at collaborating across the organization and at exerting influence across multiple domains. As the functional responsibility of sales will increase in complexity, today's leaders also have a challenging task in selecting their successors. We see transdisciplinary and interdisciplinary acumen as central to the development of transformative sales professionals in the future.

4.4.4. The integrated Return on Character® for Sales Value Chain

The integrated *Return on Character® for Sales Value Chain* draws on a combination of insights that stem from character science, mindsets, and transformative sales fluencies. Our ongoing research with KRW seeks to challenge, validate, and refine the integrated *Return on Character® for Sales Value Chain*. This framework (Figure 19) illustrates the linkages and hypothetical causality that connects character, mindsets, and fluencies with sales outcomes and impact.

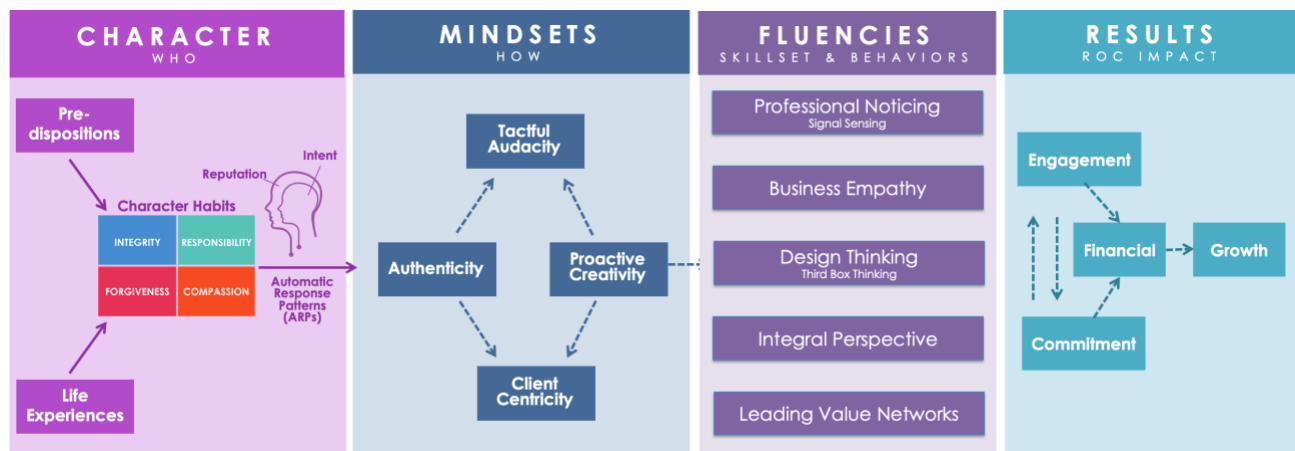


Figure 21: Return on Character® Value Chain for Sales Hypothesis (KRW, The Summit Group)

The *Return on Character® for Sales Value Chain* depicts a framework for the professionalization of sales that integrates:

- *Character* and *Mindsets*, who we are and how we think, as the origin of behaviors. A focus on character and mindsets heightens awareness and hones action in these domains and thus enables development of keystone character habits for sales.
- *Sales Fluencies* for the future depict the next-generation sales professional as a trusted strategist whose capabilities will be realized only through the integration and assimilation of vertical and horizontal learning. These fluencies, as captured in our model, represent the distinguishing factors that will determine the new role of the transformative sales professional as an orchestrator adept at aligning and leading multi-channeled collaboration, across value networks, through the co-creation journey. The central value of professional sales will guarantee the alignment of the channels, solutions, and capabilities of the leader's own company to the customer's needs, business model, and strategy. We anticipate three core distinguishing

characteristics of professional salespeople in the future: trust, empathy, and creativity. These attributes cannot be coded or replaced by an artificial intelligence algorithm.

- *Results and Return on Character® impact* represent the outcomes of the entire value chain as measured holistically by business partner/sales team engagement, customer commitment, and customer and company financial performance. These outcomes drive societal, organizational, and personal growth, the sum of which represents *Return on Character®* for sales.

4.5. Personal Reflections

4.5.1. Phil Styrlund

As we complete our inquiry, I find that I have unearthed the central ideas that correlate with the core themes of my life: faith, insecurity, and wonder. Alan Watts, in his extraordinary book *The Wisdom of Insecurity*, prompts us to consider uncertainty and insecurity as a blessing rather than a curse, as something to find hope in, rather than despair: “What if our calcified systems of belief were the very thing keeping us from experiencing life in its fullness? What if we hold to these systems so vigorously that we miss the opportunity to be held by the things those beliefs point to?” (1951, p. 51). Watts describes our adherence to systems of belief as “sucking the thumb of the hand that points to truth.” In many ways this desperate clutching can become “idolatry.”

Christians can often miss the way Christ embodies comfort and the embrace of insecurity. He leaves the security of heaven and takes on human incarnation. He is a wandering vagabond who moves from town to town and teaches his disciples how to do the same. They are learning to move forward in the face of uncertainty. So here then is Jesus of Nazareth, an image of God that has been placed to point the way to God. Ironically it was through only through his destruction that we gained access to the ultimate creator to which he was pointing.

He died to all of the things that we try to hold onto for security. In the New Testament he reminds his disciples, “unless a grain of wheat falls into the ground and dies, it remains alone. But if it dies it brings forth much fruit.” (The Bible, 1995, John 12:24-26) I have discovered that I need to die to my need for certainty and clarity. By acknowledging this limitation to my own knowledge, I have found I can become more available to the God and to the infinite and to the absolute.

As hungry as I am to understand the mysteries of the universe, the power of God's mysteries come only when I let go of the impulse to possess them. I have found that human nature shapes our temptation to limit our openness to this reality and leads us to become wed to our human perspective in a dogmatic manner. However, in limiting ourselves in this way we mute our access to the mystery and to the wonder of God's creation because we cannot see beyond what we think and what we know. In doing so, we have imposed boundaries on our own imagination.

I have found the more I replace the word "I" with "I do not know", the more open I am to accept the mystery of life and creation. My personal statement of my faith is best captured when I was able to experience Mother Teresa speak over 30 years ago. She said, "I no longer expand my mind to understand God, I seek to expand my heart to understand his mystery" (1994, n.p.). Mother Teresa's statement is the most succinct articulation of my own personal faith. It is the delightful acceptance of the grand mystery. I have defined my personal mission for life as "to be more deeply confused about more important things." I seek to continue to eliminate the desire to need to be right and simply to enjoy wrestling with the big stuff of life.

I have always had a love of words and language. However, I need to remember that words and language are just conventions. These conventions make life manageable, but they do not make life meaningful. For example, using the word "water" is a more efficient way of communicating a concept than bringing someone into a river. There is no substitute for experiencing water as it rushes over you, but when we take conventions too literally or seriously, we can often lose the deeper meaning beneath the conventions.

Part of the confusion comes from our belief that defining something means that we understand it. It is easy often to overestimate the power of language. We believe that conscious thinking and articulation can capture the heart of the actual meaning of things. Words help us define ourselves in the world around us but this definition does not mean we understand ourselves or the world around us. If we define ourselves with only words, we are literally separating ourselves from the flow of life, and we can make ourselves static and separate. But life is constant movement that we attempt to capture through thought. Paradoxically, we will open ourselves to more of life when we stop overestimating the ability of words and language to capture it. As soon as we try to make life intelligible through our words, we end up with something other than life. When we begin to admit, "I

do not know” and “I cannot make sense of this,” we can open our vision of God and the infinite. As soon as I try to name and frame God, thinking my words can capture the eternal, I end up with something else. We are all looking for security, not just physical security but also a spiritual, psychological security that transcends material comfort. We are trying to guard ourselves to fortify the “I” that has become isolated by its separation from life. Seeking security in a universe that is fundamentally in flux and impermanent is impossible. Paradoxically, hungering for security and the feeling of deep insecurity are one in the same. When we hold our breath, we cut ourselves off from breath. If we could learn to stop hungering for security, we would not experience the feeling of insecurity. We would be able to take another breath instead of holding on the last one.

I have also found that demonizing my desire for psychological safety is unhelpful. What is useful for me is to understand more deeply that there is no safety in isolation. Uncertainty and security are always with us as part of the human condition. If I can let go of my internal continuous focus on self, my compulsion to grasp for security to protect it slowly diminishes for there is no I that needs to be saved. As I let go of my compulsion to save myself, I expand dramatically my experience to live life in the moment. I have freed up space to become aware and live in the present. I can now enjoy what life offers instead of anxiously turning every experience, person, or object in my life into a toll designed to mitigate my anxiety. One of my greatest challenges is that of being present. Being present implies having a full awareness of and full immersion in the present moment; it signifies full understanding of the meaning of things. To understand things means not to be divided within oneself, with one part of us in the experience and the other part separate from it and bent on picking it apart.

This journey has elevated my awareness of my preoccupation with curiosity and wonder and has accentuated my desire to keep curiosity and wonder as central themes in my life. Goethe captured this idea eloquently: “the highest to which man can attain is wonder, and if the prime phenomenon makes him wonder, let him be content; nothing higher can it give him, and nothing further should he seek behind it; here is the limit” (Watts, 1958, p. 186).

Neel Burton’s *A Study of Wonder* (2015, 119 - 124) has had a profound impact on me. The following are excerpts that have had a significant bearing on my understanding of wonder and curiosity:

“Wonder is a complex emotion involving elements of surprise, curiosity, contemplation, and joy. It is perhaps best defined as a heightened state of consciousness and emotion brought about by something singularly beautiful, rare, or unexpected—that is, by a marvel. ‘Marvel’ derives from the Latin mirabilia (‘wonderful things’), and ultimately from the Latin mirus (‘wonderful’). ‘Admire’ shares the same root as ‘marvel’ and originally meant ‘to wonder at’, although this sense has been steadily attenuated since the 16th century—along, one might say, with wonder itself. Aquinas speaks of philosophers and poets as one because, like philosophers, poets are moved by marvels, with the purpose of poetry being, broadly, to record and in some sense recreate marvels.” (Burton, 2015, 119 - 124)

“Wonder involves significant elements of surprise and curiosity, both of which are forms of interest. Surprise is a spontaneous and short-lived reaction to something unexpected, immediately followed by at least some degree of confusion and one or more emotions such as joy, fear, disappointment, or anger. Surprise spans the divide between expectation and reality, directing our attention to something unforeseen and prompting us to re-examine and revise our concepts and beliefs. ‘Surprise’ literally means ‘overtaken’ (Old French sur + prendre). In the Tusculan Disputations, Cicero argues that true sapience is to prepare oneself for every eventuality so as never to be surprised, or overtaken, by anything. Cicero cites the example of the pre-Socratic philosopher Anaxagoras, who, upon being told of the death of his son, said, ‘I knew that I begot a mortal’” (Burton, 2015, 119 - 124)

“Curiosity is derived from the Latin cura, ‘care’. To be curious about something is to desire knowledge of that thing. Knowledge can extinguish curiosity, but not wonder. Like Plato and Aristotle, philosopher A.N. Whitehead noted that ‘philosophy begins in wonder’, adding that, ‘at the end, when philosophic thought has done its best, the wonder remains.’ So, while wonder involves significant elements of surprise and curiosity, it is other and greater than either.” (2015, 119 - 124).

The concept of wonder allows us to step outside of ourselves and thereby connects us to something far greater than the routine of daily life. It is a reunion of sorts with the world that we came from. A wise friend and mentor of mine once said, “finding yourself is not really how it works. You’re not some \$10 bill in last year’s winter coat. You’re also not lost. Your true self is right there

buried underneath cultural conditioning, other people's opinions, and inaccurate conclusions you drew as a kid that became the beliefs about who you are. Becoming yourself is actually returning to yourself. It is an unlearning, an excavation. It is remembering who you were before the world got its hands on you" (McDowell & Crowe, 2017, p. 34). Wonder is a universal experience found in children and perhaps even in higher order primates and animals. In contrast, Socratic wonder is much more rarified. Socrates describes wonder as the feeling of the philosopher not given to everyone. Yet it appears that wonder possesses commonalities that are directed at something greater than us and beyond our grasp.

In his *Advancement of Learning*, Francis Bacon called wonder "broken knowledge," and there is certainly a sense in which wonder, which may be similar to the German Wunde (wound), is something that breaches or exposes us. This breach requires filling or repairing, not only by philosophy but also by science, religion, and art. The process of repairing the wound provoked by wonder gives rise to an even more exalted kind of wonder, which is the wonder of discovery and creation.

Finally, I offer a fractured perspective. We live in destabilizing times. The sociologist Zygmunt Bauman called it "liquid modernity," the unnerving feeling of "fragility, temporariness, vulnerability and inclination to constant change." We are unsure of what is desirable or undesirable, acceptable, or not acceptable, respectful, or bigoted. Increasingly, if we don't understand these liquid rules, given that the etiquette is constantly changing, we might find ourselves singled out and scapegoated, which is humanity's time-tested mechanism to achieve social cohesion through exclusion.

Possibly the best way to face the future is as in a rowboat. Moving forward yet facing backwards. Cooperate with the graces that comes to you, faith, hope and love.

I have come to know that age brings the absolute awareness of finitude. Finitude can be framed by four core conditions:

- *Time: time moves forward toward death. To live in time is to live in anxiety*
- *Space: we live in a particular place. Space is always threatened by nature.*

- *Causality: we are contingent. Our life is contingent upon food, air, etc. Life is a caused thing, thereby we fear of things being taken away.*
- *Substance: I am a thing. I can undergo substantial change. Any substance can be destroyed.*

(Barron, 2022)

Fear comes from a focus on finitude. Nothing in this world will solve these. It is living a life a that is caved in on yourself. I can't save myself.

So where then lies the answer? God transcends limitations. The Intelligent Creator is not in time, space, causality, or substance. As long as you are in a finite space, you are stuck in this world. God offer infinite space. Only in God will my soul be in rest.

4.5.2. James Robertson

Over the past decade and longer, I feel I have worked harder and harder each year to grow our firm's business, develop new content, and increase the value created with our clients. I have been running on a treadmill whose speed is increasing, yet not advancing, in the gymnasium of life. While significant progress has been made in collaboration with the industry-leading clients with whom we are privileged to work, the incremental gains are diminishing despite increasing investments of time, energy, and resources.

The doctoral process of reading, reflecting, and dialoguing, which has been enhanced by the guidance of Professor Brian Sutton and Dr. Kate Maguire and by my interactions with Phil, Dr. Fred Keil, and Kelly Garramone has awakened me to new ways of thinking and being. First, I realize that I have viewed the domain of sales and account management practice, enablement, and development through a narrow laser-beam. I have seen only one small part of the whole. Now the flood lights have been turned on, and I can see other domains and ideas previously invisible to my constricted viewpoint. Second, I recognize that my energy has been consumed by filling the glass fuller, with more knowledge, process, principles, and tools. Without expanding the size of the glass, it has become harder to squeeze anything else into the same vessel. Now I understand there are ways to expand the size of the container, which is my mind. As I interact with hundreds of sales

professionals and learning leaders across the globe, I believe I am not alone in recognizing the unsustainability of this race to fill the glass with more skills, techniques, and tools in order to achieve higher targets, with increasingly constrained resources. A recent “Burnout in the Sales Industry” survey revealed 67% of respondents agreed or strongly agreed that they were close to experiencing burnout (Uncrushed, 2019) and that over two in five salespeople (43%) struggle with their mental health (Sales Health Alliance, 2020). It is clear that these pressures may well be contributing to escalating issues with mental health in the sales profession.

I wish I had come to this realization earlier in my life. Now I seek to pass this insight on for the benefit of people I collaborate with and for my son, Jack, as he establishes himself in the workplace and embarks on his career path and life journey. I am inspired by my new awareness of previously unexplored paths to develop sales people that expand and grow the whole person to deliver meaningful, sustainable results, while potentially mitigating burnout and mental health challenges. I anticipate that sales will play an increasingly crucial role in business and society. I believe it is my responsibility, and expectantly my legacy, to invest in and equip the next generation of sales people to think and expand their minds, so there is more capacity and space to grow, in the broadest sense, beyond a simple and burdensome accumulation of processes, tools, content, and techniques.

4.6. The impact and trajectory of our personal and professional practice

We have discovered that our doctoral journey and the development of this context statement have created an environment of living theory in our lives (Reference Context Statement Part 2: Our Doctoral Journey, Plan, and Approach on page 189). The process of research, reflection, and writing, which has been inspired and developed through dialogue with Professor Brian Sutton, has had a significant impact on how we view our lives and our profession. This journey has led us to new concepts, ideas, and frameworks that we would never have encountered had it not been for these conversations, coupled with the requirements of the doctoral process. We have made significant gains in our ability to articulate what our firm is doing now and in our capacity to conceptualize what our firm will do in the future to develop both the breadth and depth of business people and sales professionals.

As we reflect on our conclusions and the insights gained over the course of our doctoral journey, we can conceptualize diagrammatically the interconnected factors that have shaped our thinking on the future of professional selling (Figure 22 below).

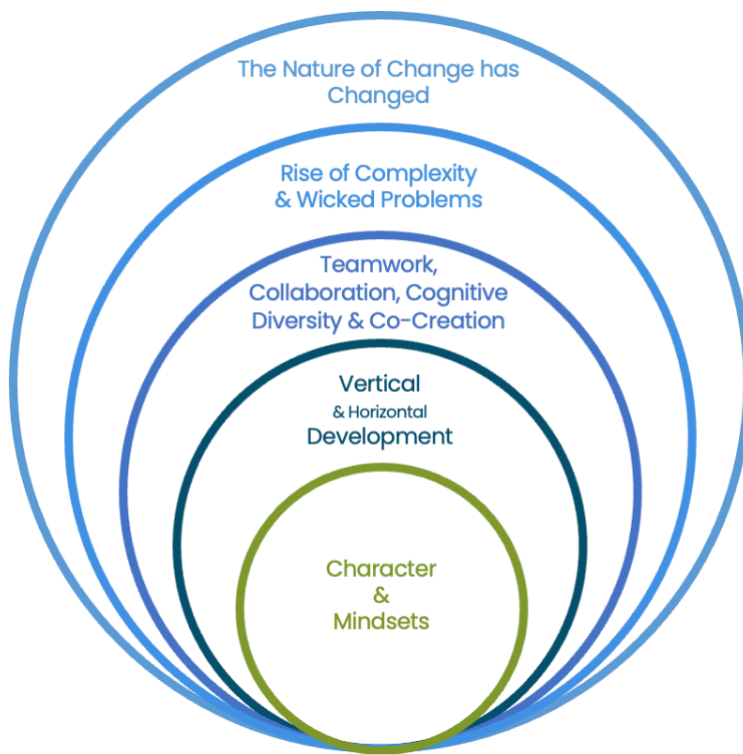


Figure 22: Interconnected Factors that Have Shaped Our Thinking on the Future of Professional Selling (Styrlund & Robertson, 2023)

The outer layer of the diagram expresses our contention that the nature of change has changed. In their theorizations of the fluidity of change, Christensen (2016), Gladwell (2002), Friedman (2005), and Ray Kurzweil (2012) support this contention. In *Liquid Modernity* (2000), Zygmunt Bauman describes the constant processes of change that affect our era and the world we inhabit. Traditional structures, relationships, and systems have broken down. Individuals are forced to adapt and reinvent themselves in order to make sense of their shifting environments. Kate Maguire’s seafarers’ metaphor offers a helpful way of visualizing this need to adjust to ever changing conditions and to facilitate understanding between hubs. Such understanding is “generative in the in between” and becomes new knowledge to navigate change (2020).

Accelerating change has given rise to increased complexity and wicked problems. The concept of wicked problems, as defined by Rittel and Webber (1973), resonated with our own experiences and interactions with clients around the world. Furthermore Brown's modes of engagement with wicked problems stresses the importance of multiple zones of knowledge (2010), and Checkland provides a mechanism to comprehensively map the terrain and relationships of problem domains by deploying 'Rich Pictures' (2011). These concepts shed light on the incessant change we encounter in our practice by reframing complexity and the intractable problems that cannot be solved at the same level they were created. Dealing with complexity and wicked problems entails the mobilization of a higher order of teamwork, collaboration, cognitive diversity, and co-creation.

Ultimately, the problems we now face cannot be addressed without vertical development. The skills that need to be brought to bear on wicked problems require not just horizontal development, which is aimed at expanding the hard drive of people, but vertical development, which aims to amplify the depth, capacity, and capability to simultaneously hold contradictory perspectives (Kegan, 1982) to develop one's sense of 'being' in the world. The concept and practice of vertical development has become our central preoccupation. Reflecting on the ripple effect of factors conceptualized in Figure 22 that cohere in the future of selling, we are convinced that vertical development must be anchored in character and next generation mindsets as enablers to ensure sustainable business impact, mental health, and wellbeing, and social good.

In conclusion, this doctoral journey has fundamentally altered the trajectory of our firm, The Summit Group, and of our thinking, work, and lives. First, it has codified our vision for the next generation of our firm to become leaders in the development of future-ready, transdisciplinary, transformative sales professionals. These sales professionals of the future will expand their business and sales acumen, integrated with depth of character, mindsets, competency, and cognitive capacity. Second, we have considerably elevated our capability to articulate our consultancy and developmental training services, and their impact on our clients' businesses and their customers. Third, it has informed our creation of a more precise and prescient profile for ourselves and for our colleagues. Together we will shape our vision, co-create our new business model, and accelerate client impact. We now see that who we are and how we think matters as much as what we know. Together we will embody and live the values, mindsets, and character of the change we project.

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Context Statement Part 2: Our Doctoral Journey, Plan, and Approach

Our doctoral journey took us on a pilgrimage we would never have travelled. We were guided by a wise sherpa, Professor Brian Sutton. On this trail, which began many years ago when we met Professor Kate Maguire in a hotel lobby in London, we encountered fellow travelers, thought leaders, knowledge platforms, academic research, and wise counselors whom we would never have met had we not embarked on this path. The trail and this journey have caused a transformation in who we are and how we think.

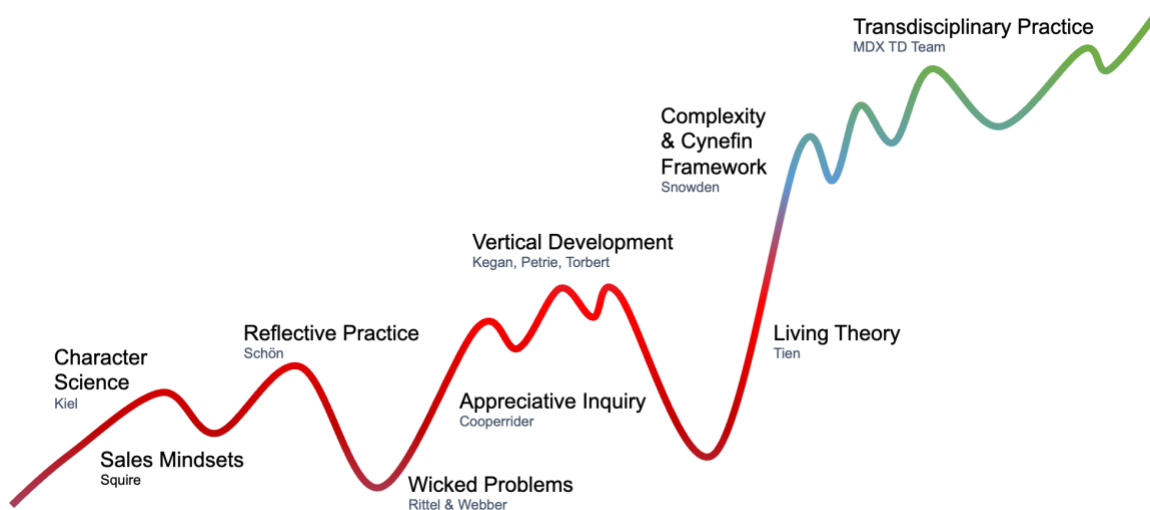


Figure 23: Our Doctoral Journey - The Path is the Value (Styrlund & Robertson, 2023)

The guiding light on this journey was dialogue with Professor Brian Sutton, our Director of Studies, who provided gracious guidance and the impetus to explore areas we had never seen before, to pause, reflect, and challenge, even dismantle, some previously held truths. This critical interrogation enabled a structured excavation of our personal and our professional lives, in order to illuminate new ways of thinking and being in the future.

Over the three years of our doctorate, on which we embarked in 2020, there were unprecedented upheavals in the world, in our business, and in our personal lives. Covid-19 was part of this context. The virus represented a plague, but for us it was also represented a way of keeping us on the ground. We have long lived in the air: together we have over 10 million miles on Delta Airlines. We

believe that COVID-19 paradoxically played a providential role in enabling us to complete this voyage.

Contemplative images of our journey might be the Camino de Santiago, or the Appalachian trail, among others. The framing metaphor we believe most appropriate is the journey of the Sankofa (Masterclass, 2022). This African symbol for wisdom depicts a bird that is flying forward in life, yet looking back to learn from its past and to bring forth the wisdom that creates a more meaningful and fulfilling future. We can think of no symbol that better represents our experience. This journey has been intellectual, emotional, and spiritual in nature. Given Phil's cancer surgery in February 2023, it has also been a physical one, which we believe was part of this journey. During this expedition we found there were times that we broke down; there were times we broke through, but most importantly the journey caused us to break open to reveal ourselves more deeply in a way that at times almost frightened us. Now we have crossed the Rubicon. There is no turning back: we are not the same people as when we started. We are in a new land, and we are showing up in new ways that we never expected.

As we reflect on the important stages of our doctoral journey, the analogy of a forest fire and re-growth of new trees captures our experience and the ways we have planned, collaborated, changed, and grown.

Stage 1 (June 2020 – July 2021): In the beginning there was a fire. It burnt down the old trees and cleared the thick brush obstructing the forest floor.

The impetus to embark on our doctorate was, in part, the opportunity to take stock of our careers and consulting practice spanning over forty years in sales, marketing and management. However, our primary motivations were embedded in the mutual realization of the widening gap between the existing sales practices and the escalating demands emanating from the rapidly changing business-to-business selling environment. This consciousness coalesced a shared purpose and common opportunity to shape the future of our professional and personal practices, and to chart a path forward that expands sustainable value for our clients and distinguishes and grows The Summit Group and ourselves.

Following submission and review of our Public Works and acceptance into the Doctor of Professional Studies by Public Works program, Prof. Brian Sutton, our Director of Studies, was candid with us: “In the first nine months to a year I’m going to break it down. You are going to get worn out. You will read and then write a series of papers and you’re going to think that this is complete chaos. But then we’ll get back together and you will be prepared to start writing your Context Statement”.

With hindsight, we realize Brian was rebooting our operating system and immersing us in the core elements of reflective practice, appreciative inquiry, and transdisciplinary thinking. He introduced us to ideas like wicked problems, complexity frameworks, and vertical development, and taught us the concept of lenses of interrogation. Initially we were stuck. At first we were unsure how to apply these new concepts or use the lenses. As Brian, the master of metaphor, said, “it will be like stepping into a dark storage shed with no light and then turning on torches (flashlights) to illuminate what is unseen and unknown”. We were reverting to the beginner’s mind, a *tabula rasa*, or blank slate, that was ready to be written on.

Our collaboration translated into mutual accountability and shared resolve to move forward. While this shared purpose and joint responsibility has been a hallmark of our long-term partnership, it played a crucial role enabling us to move past multiple conversations that challenged the logic of undertaking our doctorate at the same time the pandemic demanded we transform our business.

Shared values underpin our long-term collaboration and prove to be powerful guiding forces as we worked through doubt, disagreement, and diverging perspectives in the doctoral process.

Specifically:

- *Being interested* and a *growth mindset* enables us to believe we can always be better and ensures an openness, even a passion, for learning and exploring new paths revealed to us;
- *Collaborating* based on trust enables the integration of our unique strengths and diverse perspectives to challenge each other’s assumptions, validate ideas, and amplify the impact of our thinking.
- Believing that business, and our consulting practice, is a *powerful vehicle for change* for the common good of our colleagues, clients, people, and society is the foundation for why we continue to do what we do.

Stage 2 (July 2021 and ongoing): After the fire, there was new growth. Trees grew organically, with their structure of trunks and branches. Iteratively, accompanied by Brian, we spent most of our time discussing, debating, and deciding the outline, which represented the trunk of our body of work – the Context Statement.

A hallmark of our collaboration over almost 20 years, which we tapped into throughout the doctorate, is our intuitive ability to leverage each other's strengths and mitigate limitations. James describes Phil as an integral, creative thinker who has the ability to scan and draw on multiple, diverse perspectives to build on and shape new ideas. In developing our Public Works and researching and writing our context statement Phil devoured an expanse of literature, research papers, books, and media to synthesize and integrate multiple domains of knowledge and extract the key insights informing our thesis including character science, mindsets, adult learning and development, wicked problems, reflective practice, transdisciplinarity, and action learning.

Complementarily, Phil often refers to James as the “chief adult officer” at The Summit Group and highlights James’ architectural thinking, discipline, and rigor. In our doctoral journey this translated into structuralizing and connecting Phil’s ideas and insights into an integrated whole with an organized flow that attempts to connect the dots from initial abstract to this concluding appendix.

Through the years, by simply trusting and respecting each other’s giftedness, we’ve created an unconscious collaboration that permeates each day, engagement, and body of work we create. As we have paved our path together, it is similar to jointly laying a walking path. Phil tends to intuitively create the framework for the next body of work and James fills in the concrete. We then jointly step back, assess the work, and assure the path is in the right direction.

A synthetic thinker, Phil weaves together ideas and information from an array of sources spanning a myriad of domains. James then creates the taxonomy, structure, and content. Phil would say, “I’m the beggar telling other beggars where I found the bread”. James bakes the bread.”

We are in unreserved agreement that this precious partnership is one of the greatest gifts of our lives and one that neither of us has ever experienced. In many ways, it is a form of business marriage grounded in respect, unshakable trust, and commitment to our jointly chosen life vocation.

Was is birthed is a form of emotional insurance policy in that we know there is nothing we cannot create or overcome through our collaboration.

Our providential and unique partnership allows us to be hyper-productive for, with egos set aside, we have no need to compete or out-do each other. We work in constant honor of each other's hardwired gifts and realize that when we keep our eyes on the grander good, we will find a way to get there together.

Stage 3 (August 2021 – December 2022): the branches and leaves were formed. Collaboratively we defined the content, elements, and key topics in each chapter. We then stepped back and divided to conquer with a lead-follow model. This model helped us to decide who would lead in developing and writing each section within each chapter.

To develop our thinking and to write our Context Statement we carried out a number of formative activities:

- Read deeply and broadly.
- Spent an afternoon interviewing Phil Squire on sales mindsets (October 2021).
- Conducted multiple interviews and spent days on retreat, at Sacred Clay Inn (Minnesota, USA) with Dr. Fred Kiel, Kelly Garramone, and the KRW research team, in which we delved into character science (2020, 2021, 2022).
- Cross pollinated by sharing the first drafts that we had each written.
- Conducted multiple Zoom and in-person 'whiteboarding' sessions to meld and edit second drafts of each chapter.
- Reviewed and edited to ensure sure we were meeting academic level eight descriptors and standards and that our work was rigorous both from a content and construct standpoint.
- Reviewed each third or fourth draft chapter with Brian who encouraged us to read around the core themes to grow the branches and leaves – the core concepts and ideas that attached to the branches. We undertook a lot of reading, exploring, and synthesizing at this stage, including sharing and testing ideas and hypotheses with sales and go-to-market thought leaders and clients.
- Arrived at an output, the final draft of the branches and leaves that formed each chapter in our Context Statement.

- As a final step, before submission of the Context Statement, we reviewed the document in its entirety, to see things whole and validate the logic, flow, integration, and balance of perspectives.

Another strength we leverage in our collaboration is the power of “yes, and...” thinking whereby, as in improvisational comedy, we respect, build on and amplify each other’s ideas. Whilst both of our careers have focused on sales, marketing, and management, and we share common values, our perspectives are shaped by diverse cultural, work and life experiences, enabling us to expound on, enrich and deepen each other’s thoughts. Concurrently we have earned the right to challenge each other’s premises and assumptions, always with respect. This practice invariably results in more fully-formed ideas that integrate our collective ways of knowing and being.

Stage 5 (January – March 2023): as we prepared for our viva voce, we came out of the forest to reflect on the doctoral journey, our key learning, and to discuss the path forward for our professional practice, which will enable the next generation of selling and our continued personal journeys.

Our shared values, common purpose, diverse thinking, and complementary capabilities have been amplified through our doctoral experience. Our evolved ways of thinking, working, doing and being will, and has already, transformed how we show up in the world, how we collaborate and engage with clients to lead learning, co-create value, and develop ‘fit for the future’ sales professionals.



Figure 24: Character Science Retreat with Dr. Fred Kiel and Kelly Garramone, May 2021

Context Statement Part 3: The Public Works Portfolio & Contents

A Relevance			
#	Public Works	Reference	Description & Links
1	Relevance: Matter More	Hayes & Styrlund, 2014	A book and TEDx talk articulating the role, creation, and composition of relevance in business, sales, and life. LINK
2	Trademarked Strategic Selling / Account Management Principles & Tools	Styrlund; Robertson, 2019	List of The Summit Group's Trademarks registered with US Office of Patents & Trademarks – detailing distinctive and unique strategic selling / account management tools and principles. LINK

B Strategic / Value Selling, Process, Principles, Learning & Development			
#	Public Works	Reference	Description & Links
3	Value Roadmap Series	Styrlund; Bharmal; Robertson; 2009	Pragmatic guide enabling business-to-business value transformation. First published in the <i>SAMA Velocity Journal</i> . LINK
4	White Paper: <i>Distinguishing Customer Engagement – What the Best Do Differently</i>	Styrlund; Robertson, 2019	Industry white paper articulating thought leadership in area of customer engagement and value selling. LINK
5	White Paper: <i>Accelerating Third Box Growth</i>	Styrlund; Robertson, 2019	Industry white paper articulating thought leadership in area of customer engagement and value selling leveraging outside-in / customer-centric thinking. LINK
6	SAMA SAM Certification Curricula and Programs	Styrlund; Robertson, 2020	Design and deployment of comprehensive learning journey enabling Strategic/Key Account Managers to develop best-in-class customer business development & relationship management competencies. This public works includes the innovative design of a blended learning curricula and all the content required to deliver learning that enables best-in-class key/strategic account management capabilities and industry recognized certification by the Strategic Account Management Association. LINK
7	Account Management for Sales: Program and Micro/digital-Learning Video Series	Robertson; Styrlund, 2020	On-line, digital program integrating over 15 digital micro-learning video segments enabling sales professionals and Strategic/Key Account Managers to learn virtually to develop best-in-class customer business development & relationship management competencies. This program offered publicly by the Strategic Account Management Association and recognized with Brandon Hall Group Learning & Development Excellence GOLD AWARD 2022 (Category: Best Advance in Competencies and Skill Development) for global KAM pharma transformation initiative. LINK . SAMA WEBSITE LINK
8	Live Workshop/Webinar: <i>SAM Next-Gen Archetype</i>	Styrlund; Robertson, 2019	Development and delivery of integrated competency model depicting next-generation mindsets and skillsets required for Strategic Selling and Strategic/Key Account Management. Presented at the Strategic Account Management Association Annual Conference in 2019. LINK
9	Live Workshop/Webinar: <i>SAM – Where to Begin</i>	Styrlund; Robertson, Ford, 2019	Development and delivery of integrated roadmap to implement Strategic and Key Account Management

			program. Presented at the Strategic Account Management Association Annual Conference ion 2019. LINK
10	Webinar and whitepaper: 7 Forces Transforming Sales	Styrlund; 2019	Seven Forces Transforming Sales. LINK
11	Live SAMA Workshop: Key Account Management @ Tetra Pak	Robertson; 2005	Key-note presentation describing leading practice development and application of Key Account Management at Tetra Pak. LINK
12	Enabling, Accelerating and Sustaining SAM	Robertson; Walker; Cote, 2022	Strategic Account Management enablers – including and beyond methodology/process and tools. Co-presented with Medtronic at SAMA Annual Conference 2021. LINK
13	Next-Level Strategic Account Management	Robertson; Cote; 2021	Next-Level SAM research findings presented at SAMA Annual Conference 2021. LINK

C Business Value Co-Creation				
#	Public Works	Date	Authors	Description
14	SAMA Book: Customer Value Co-Creation Chapter: <i>Creating Joint Solutions with Strategic Customers</i>	Styrlund; Robertson, 2017		Comprehensive summary of leading practices and tools defining how companies collaborate to co-create value (Chapter in book published by Strategic Account Management Association). LINK
15	Growing Together (Part 1 and 2)	Styrlund; Robertson, 2019		How companies collaborate to innovate and create joint solutions that accelerate growth and market share (Published in the <i>International Journal of Sales Transformation</i>). PART #1 LINK ; PART #2 LINK
16	Live Workshop/Webinar: Co-Creating Value	Styrlund; Robertson, 2019		Development and delivery of a leading practice business case describing how 3M co-creates business value and co-innovates with their customers. LINK